

# **U.S. Department of Education**

**Washington, D.C. 20202-5335**



## **APPLICATION FOR GRANTS UNDER THE**

**CHARTER SCHOOLS PROGRAM - REPLICATION AND EXPANSION OF HIGH-  
QUALITY CHARTER SCHOOLS (84.282M)**

**CFDA # 84.282M**

**PR/Award # U282M100039**

OMB No. 1894-0006, Expiration Date:

Closing Date: JUL 07, 2010

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This application was generated using the PDF functionality. The PDF functionality automatically numbers the pages in this application. Some pages/sections of this application may contain 2 sets of page numbers, one set created by the applicant and the other set created by e-Application's PDF functionality. Page numbers created by the e-Application PDF functionality will be preceded by the letter e (for example, e1, e2, e3, etc.).

<b>Application for Federal Assistance SF-424</b>		Version 02	
* 1. Type of Submission <input type="checkbox"/> Preapplication <input checked="" type="checkbox"/> Application <input type="checkbox"/> Changed/Corrected Application		* 2. Type of Application: * If Revision, select appropriate letter(s): <input checked="" type="checkbox"/> New <input type="checkbox"/> Continuation      * Other (Specify) <input type="checkbox"/> Revision	
* 3. Date Received: 7/14/2010		4. Applicant Identifier:	
5a. Federal Entity Identifier:		* 5b. Federal Award Identifier: 84.282M	
<b>State Use Only:</b>			
6. Date Received by State:		7. State Application Identifier:	
<b>8. APPLICANT INFORMATION:</b>			
* a. Legal Name:    Mastery Charter High School			
* b. Employer/Taxpayer Identification Number (EIN/TIN): 233060542		* c. Organizational DUNS: 039280289	
<b>d. Address:</b>			
* Street1:		35 S. 4th Street	
Street2:			
* City:		Philadelphia	
County:		Philadelphia	
State:		PA	
Province:			
* Country:		USA	
* Zip / Postal Code:		19106	
<b>e. Organizational Unit:</b>			
Department Name: Mastery Charter School		Division Name: Innovation Division	
<b>f. Name and contact information of person to be contacted on matters involving this application:</b>			
Prefix:	Mrs.	* First Name:	Courtney
Middle Name:	A		

\* Last Name: Collins-Shapiro

Suffix:

Title: Deputy Chief Innovation Officer

Organizational Affiliation:

\* Telephone Number: (267)688-6868

Fax Number: (215)866-9141

\* Email: COURTNEY.SHAPIRO@MASTERYCHARTER.ORG

**Application for Federal Assistance SF-424**

Version 02

**9. Type of Applicant 1: Select Applicant Type:**

M: Nonprofit with 501C3 IRS Status (Other than Institution of Higher Education)

Type of Applicant 2: Select Applicant Type:

Type of Applicant 3: Select Applicant Type:

\* Other (specify):

**10. Name of Federal Agency:**

U.S. Department of Education

**11. Catalog of Federal Domestic Assistance Number:**

84.282M

CFDA Title:

Charter Schools Program - Replication and Expansion of High-Quality Charter Schools (84.282M)

**\* 12. Funding Opportunity Number:**

ED-Grants-052410-001

Title:

CSP Grants for Replication and Expansion of High-Quality Charter Schools  
(CFDA# 84.282M)

**13. Competition Identification Number:**

84.282M

Title:

Charter Schools Program - Replication and Expansion of High-Quality Charter  
Schools (84.282M)

**14. Areas Affected by Project (Cities, Counties, States, etc.):**

Philadelphia City and County, Pennsylvania  
Camden, New Jersey

**\* 15. Descriptive Title of Applicant's Project:**

Mastery Charter School Replication Project for High-Quality Turnaround Schools

Attach supporting documents as specified in agency instructions.

**Attachment:**

Title :

File :

**Attachment:**

Title :

File :

**Attachment:**

Title :

File :

**Application for Federal Assistance SF-424**

Version 02

**16. Congressional Districts Of:**

\* a. Applicant: PA-001

\* b. Program/Project: PA-002, PA-013

Attach an additional list of Program/Project Congressional Districts if needed.

**Attachment:**

Title :

File :

**17. Proposed Project:**

\* a. Start Date: 9/15/2010

\* b. End Date: 6/30/2015

**18. Estimated Funding (\$):**

a. Federal	\$ 7950000
b. Applicant	\$ 0
c. State	\$ 0
d. Local	\$ 0
e. Other	\$ 2000000
f. Program Income	\$
g. TOTAL	\$ 9950000

**\* 19. Is Application Subject to Review By State Under Executive Order 12372 Process?**

☐ a. This application was made available to the State under the Executive Order 12372 Process for review on .

☒ b. Program is subject to E.O. 12372 but has not been selected by the State for review.

☐ c. Program is not covered by E.O. 12372.

**\* 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes", provide explanation.)**

☐ Yes ☒ No

**21. \*By signing this application, I certify (1) to the statements contained in the list of certifications\*\* and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances\*\* and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 218, Section 1001)**

☒ \*\* I AGREE

\*\* The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.

**Authorized Representative:**

Prefix: Mr. \* First Name: Scott

Middle Name:

\* Last Name: Gordon

Suffix:

Title: Chief Executive Officer

\* Telephone Number: (215)866-9000 Fax Number: (215)866-9141

\* Email: SCOTT.GORDON@MASTERYCHARTER.ORG

\* Signature of Authorized  
Representative:

\* Date Signed:

**Application for Federal Assistance SF-424**

Version 02

**\* Applicant Federal Debt Delinquency Explanation**

The following field should contain an explanation if the Applicant organization is delinquent on any Federal Debt. Maximum number of characters that can be entered is 4,000. Try and avoid extra spaces and carriage returns to maximize the availability of space.

**U.S. DEPARTMENT OF EDUCATION****BUDGET INFORMATION****NON-CONSTRUCTION PROGRAMS**

OMB Control Number: 1894-0008

Expiration Date: 02/28/2011

Name of Institution/Organization:  
Mastery Charter High School

Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.

**SECTION A - BUDGET SUMMARY**  
**U.S. DEPARTMENT OF EDUCATION FUNDS**

Budget Categories	Project Year 1(a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel	\$ 677,067	\$ 973,410	\$ 1,172,038	\$ 1,143,046	\$ 619,032	\$ 4,584,593
2. Fringe Benefits	\$ 64,959	\$ 160,080	\$ 218,365	\$ 207,417	\$ 198,090	\$ 848,911
3. Travel	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
4. Equipment	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
5. Supplies	\$ 372,174	\$ 364,710	\$ 496,797	\$ 167,737	\$ 181,578	\$ 1,582,996
6. Contractual	\$ 45,000	\$ 75,000	\$ 100,000	\$ 55,000	\$ 22,500	\$ 297,500
7. Construction	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
8. Other	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
9. Total Direct Costs (lines 1-8)	\$ 1,159,200	\$ 1,573,200	\$ 1,987,200	\$ 1,573,200	\$ 1,021,200	\$ 7,314,000
10. Indirect Costs*	\$ 100,800	\$ 136,800	\$ 172,800	\$ 136,800	\$ 88,800	\$ 636,000
11. Training Stipends	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
12. Total Costs (lines 9- 11)	\$ 1,260,000	\$ 1,710,000	\$ 2,160,000	\$ 1,710,000	\$ 1,110,000	\$ 7,950,000

**\*Indirect Cost Information (To Be Completed by Your Business Office):**

If you are requesting reimbursement for indirect costs on line 10, please answer the following questions:

(1) Do you have an Indirect Cost Rate Agreement approved by the Federal government? ☐ Yes ☒ No

(2) If yes, please provide the following information:

Period Covered by the Indirect Cost Rate Agreement: From: \_\_/\_\_/\_\_ To: \_\_/\_\_/\_\_ (mm/dd/yyyy)

Approving Federal agency: ☐ ED ☐ Other (please specify): \_\_\_\_\_ The Indirect Cost Rate is 0%

(3) For Restricted Rate Programs (check one) -- Are you using a restricted indirect cost rate that:

☐ Is included in your approved Indirect Cost Rate Agreement? or, ☒ Complies with 34 CFR 76.564(c)(2)? The Restricted Indirect Cost Rate is 8%



**U.S. DEPARTMENT OF EDUCATION****BUDGET INFORMATION****NON-CONSTRUCTION PROGRAMS**

OMB Control Number: 1894-0008

Expiration Date: 02/28/2011

Name of Institution/Organization:  
Mastery Charter High School

Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.

**SECTION B - BUDGET SUMMARY****NON-FEDERAL FUNDS**

Budget Categories	Project Year 1(a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel	\$ 509,936	\$ 577,440	\$ 595,082	\$ 317,542	\$ 0	\$ 2,000,000
2. Fringe Benefits	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
3. Travel	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
4. Equipment	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
5. Supplies	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
6. Contractual	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
7. Construction	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
8. Other	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
9. Total Direct Costs (lines 1-8)	\$ 509,936	\$ 577,440	\$ 595,082	\$ 317,542	\$ 0	\$ 2,000,000
10. Indirect Costs	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
11. Training Stipends	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
12. Total Costs (lines 9-11)	\$ 509,936	\$ 577,440	\$ 595,082	\$ 317,542	\$ 0	\$ 2,000,000

## ASSURANCES - NON-CONSTRUCTION PROGRAMS

Standard Form 424B (Rev.7-97)

Public reporting burden for this collection of information is estimated to average 15 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to the Office of Management and Budget, Paperwork Reduction Project (0348-0040), Washington DC 20503.

**PLEASE DO NOT RETURN YOUR COMPLETED FORM TO THE OFFICE OF MANAGEMENT AND BUDGET. SEND IT TO THE ADDRESS PROVIDED BY THE SPONSORING AGENCY.**

**NOTE:** Certain of these assurances may not be applicable to your project or program. If you have questions, please contact the awarding agency. Further, certain Federal awarding agencies may require applicants to certify to additional assurances. If such is the case, you will be notified.

As the duly authorized representative of the applicant, I certify that the applicant:

1. Has the legal authority to apply for Federal assistance, and the institutional, managerial and financial capability (including funds sufficient to pay the non-Federal share of project cost) to ensure proper planning, management, and completion of the project described in this application.
2. Will give the awarding agency, the Comptroller General of the United States, and if appropriate, the State, through any authorized representative, access to and the right to examine all records, books, papers, or documents related to the award; and will establish a proper accounting system in accordance with generally accepted accounting standards or agency directives.
3. Will establish safeguards to prohibit employees from using their positions for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain.
4. Will initiate and complete the work within the applicable time frame after receipt of approval of the awarding agency.
5. Will comply with the Intergovernmental Personnel Act of 1970 (42 U.S.C. "4728-4763) relating to prescribed standards for merit systems for programs funded under one of the 19 statutes or regulations specified in Appendix A of OPM's Standards for a Merit System of Personnel Administration (5 C.F.R. 900, Subpart F).
6. Will comply with all Federal statutes relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. "1681-1683, and 1685-1686), which prohibits discrimination on the basis of sex; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. '794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act
9. Will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. "276a to 276a-7), the Copeland Act (40 U.S.C. '276c and 18 U.S.C. "874) and the Contract Work Hours and Safety Standards Act (40 U.S.C. " 327-333), regarding labor standards for federally assisted construction sub-agreements.
10. Will comply, if applicable, with flood insurance purchase requirements of Section 102(a) of the Flood Disaster Protection Act of 1973 (P.L. 93-234) which requires recipients in a special flood hazard area to participate in the program and to purchase flood insurance if the total cost of insurable construction and acquisition is \$10,000 or more.
11. Will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in floodplains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. "1451 et seq.); (f) conformity of Federal actions to State (Clear Air) Implementation Plans under Section 176(c) of the Clear Air Act of 1955, as amended (42 U.S.C. "7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended, (P.L. 93-523); and (h) protection of endangered species under the Endangered Species Act of 1973, as amended, (P.L. 93-205).
12. Will comply with the Wild and Scenic Rivers Act of 1968 (16 U.S.C. "1721 et seq.) related to protecting components or potential components of the national wild and scenic rivers system.
13. Will assist the awarding agency in assuring compliance

of 1975, as amended (42 U.S.C. " 6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255), as amended, relating to nondiscrimination on the basis of drug abuse; (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (P.L. 91-616), as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) " 523 and 527 of the Public Health Service Act of 1912 (42 U.S.C. " 290 dd-3 and 290 ee 3), as amended, relating to confidentiality of alcohol and drug abuse patient records; (h) Title VIII of the Civil Rights Act of 1968 (42 U.S.C. ' 3601 et seq.), as amended, relating to nondiscrimination in the sale, rental or financing of housing; (i) any other nondiscrimination provisions in the specific statute(s) under which application for Federal assistance is being made; and (j) the requirements of any other nondiscrimination statute(s) which may apply to the application.

7. Will comply, or has already complied, with the requirements of Titles II and III of the uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (P.L. 91-646) which provide for fair and equitable treatment of persons displaced or whose property is acquired as a result of Federal or federally assisted programs. These requirements apply to all interests in real property acquired for project purposes regardless of Federal participation in purchases.
8. Will comply, as applicable, with the provisions of the Hatch Act (5 U.S.C. "1501-1508 and 7324-7328) which limit the political activities of employees whose principal employment activities are funded in whole or in part with Federal funds.

with Section 106 of the National Historic Preservation Act of 1966, as amended (16 U.S.C. '470), EO 11593 (identification and protection of historic properties), and the Archaeological and Historic Preservation Act of 1974 (16 U.S.C. "469a-1 et seq.).

14. Will comply with P.L. 93-348 regarding the protection of human subjects involved in research, development, and related activities supported by this award of assistance.
15. Will comply with the Laboratory Animal Welfare Act of 1966 (P.L. 89-544, as amended, 7 U.S.C. "2131 et seq.) pertaining to the care, handling, and treatment of warm blooded animals held for research, teaching, or other activities supported by this award of assistance.
16. Will comply with the Lead-Based Paint Poisoning Prevention Act (42 U.S.C. "4801 et seq.) which prohibits the use of lead- based paint in construction or rehabilitation of residence structures.
17. Will cause to be performed the required financial and compliance audits in accordance with the Single Audit Act Amendments of 1996 and OMB Circular No. A-133, "Audits of States, Local Governments, and Non-Profit Organizations."
18. Will comply with all applicable requirements of all other Federal laws, executive orders, regulations and policies governing this program.

<b>Signature of Authorized Certifying Representative:</b>
<b>Name of Authorized Certifying Representative:</b> Scott Gordon
<b>Title:</b> Chief Executive Officer
<b>Date Submitted:</b> 06/10/2010

## Disclosure of Lobbying Activities

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352

<b>1. Type of Federal Action:</b> <input type="checkbox"/> Contract <input checked="" type="checkbox"/> Grant <input type="checkbox"/> Cooperative Agreement <input type="checkbox"/> Loan <input type="checkbox"/> Loan Guarantee <input type="checkbox"/> Loan Insurance	<b>2. Status of Federal Action:</b> <input checked="" type="checkbox"/> Bid/Offer/Application <input type="checkbox"/> Initial Award <input type="checkbox"/> Post-Award	<b>3. Report Type:</b> <input checked="" type="checkbox"/> Initial Filing <input type="checkbox"/> Material Change <b>For Material Change only:</b> Year: 0Quarter: 0 Date of Last Report:
<b>4. Name and Address of Reporting Entity:</b> <input checked="" type="checkbox"/> Prime <input type="checkbox"/> Subawardee Tier, if known: 0 Name: Mastery Charter School Address: 35 South 4th Street City: Philadelphia State: PA Zip Code + 4: 19106-2710  <b>Congressional District, if known:</b> 01	<b>5. If Reporting Entity in No. 4 is a Subawardee, Enter Name and Address of Prime:</b> Name: Address: City: State: Zip Code + 4: -  <b>Congressional District, if known:</b>	
<b>6. Federal Department/Agency:</b> Education, Office of Innovation/ Improve	<b>7. Federal Program Name/Description:</b> Charter Schools Program Expansion Grant  CFDA Number, if applicable: 84.282M	
<b>8. Federal Action Number, if known:</b>	<b>9. Award Amount, if known:</b> \$0	
<b>10. a. Name of Lobbying Registrant</b> (if individual, last name, first name, MI): Address: City: State: Zip Code + 4: -	<b>b. Individuals Performing Services</b> (including address if different from No. 10a) (last name, first name, MI): Address: City: State: Zip Code + 4: -	
<b>11.</b> Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.	Name: Scott Gordon Title: Chief Executive Officer Applicant: Mastery Charter High School Date: 06/10/2010	
<b>Federal Use Only:</b>		Authorized for Local Reproduction Standard Form LLL (Rev. 7-97)

## CERTIFICATION REGARDING LOBBYING

Certification for Contracts, Grants, Loans, and Cooperative Agreements.

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal Loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan or cooperative agreement, the undersigned shall complete and submit Standard Form - LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Statement for Loan Guarantees and Loan Insurance.

The undersigned states, to the best of his or her knowledge and belief, that:

If any funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee or any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this commitment providing for the United States to insure or guarantee a loan, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions. Submission of this statement is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required statement shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

### APPLICANT'S ORGANIZATION

Mastery Charter High School

### PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE

Prefix: Mr. First Name: Scott Middle Name:

Last Name: Gordon Suffix:

Title: Chief Executive Officer

Signature:

Date:

06/10/2010

ED 80-0013

03/04

## Section 427 of GEPA

### NOTICE TO ALL APPLICANTS

The purpose of this enclosure is to inform you about a new provision in the Department of Education's General Education Provisions Act (GEPA) that applies to applicants for new grant awards under Department programs. This provision is Section 427 of GEPA, enacted as part of the Improving America's Schools Act of 1994 (Public Law (P. L.) 103-382).

#### **To Whom Does This Provision Apply?**

Section 427 of GEPA affects applicants for new grant awards under this program. **ALL APPLICANTS FOR NEW AWARDS MUST INCLUDE INFORMATION IN THEIR APPLICATIONS TO ADDRESS THIS NEW PROVISION IN ORDER TO RECEIVE FUNDING UNDER THIS PROGRAM.**

(If this program is a State-formula grant program, a State needs to provide this description only for projects or activities that it carries out with funds reserved for State-level uses. In addition, local school districts or other eligible applicants that apply to the State for funding need to provide this description in their applications to the State for funding. The State would be responsible for ensuring that the school district or other local entity has submitted a sufficient section 427 statement as described below.)

#### **What Does This Provision Require?**

Section 427 requires each applicant for funds (other than an individual person) to include in its application a description of the steps the applicant proposes to take to ensure equitable access to, and participation in, its Federally-assisted program for students, teachers, and other program beneficiaries with special needs. This provision allows applicants discretion in developing the required description. The statute highlights six types of barriers that can impede equitable access or participation: gender, race, national origin, color, disability, or age. Based on local circumstances, you should determine whether these or other barriers may prevent your students, teachers, etc. from such access or participation in, the Federally-funded project or activity. The description in your application of steps to be taken to overcome these barriers need not be lengthy; you may provide a clear and succinct

description of how you plan to address those barriers that are applicable to your circumstances. In addition, the information may be provided in a single narrative, or, if appropriate, may be discussed in connection with related topics in the application.

Section 427 is not intended to duplicate the requirements of civil rights statutes, but rather to ensure that, in designing their projects, applicants for Federal funds address equity concerns that may affect the ability of certain potential beneficiaries to fully participate in the project and to achieve to high standards. Consistent with program requirements and its approved application, an applicant may use the Federal funds awarded to it to eliminate barriers it identifies.

#### **What are Examples of How an Applicant Might Satisfy the Requirement of This Provision?**

The following examples may help illustrate how an applicant may comply with Section 427.

- (1) An applicant that proposes to carry out an adult literacy project serving, among others, adults with limited English proficiency, might describe in its application how it intends to distribute a brochure about the proposed project to such potential participants in their native language.
- (2) An applicant that proposes to develop instructional materials for classroom use might describe how it will make the materials available on audio tape or in braille for students who are blind.
- (3) An applicant that proposes to carry out a model science program for secondary students and is concerned that girls may be less likely than boys to enroll in the course, might indicate how it intends to conduct "outreach" efforts to girls, to encourage their enrollment.

We recognize that many applicants may already be implementing effective steps to ensure equity of access and participation in their grant programs, and we appreciate your cooperation in responding to the requirements of this provision.

### Estimated Burden Statement for GEPA Requirements

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. The valid OMB control number for this information collection is **1894-0005**. The time required to complete this information collection is estimated to average 1.5 hours per response, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. **If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to:** U.S. Department of Education, 400 Maryland Avenue, S.W., Washington, D.C. 20202-4537.

Applicants should use this section to address the GEPA provision.

**Attachment:**

Title : 427 of GEPA

File : C:\fakepath\427 of GEPA attachment MCS.doc

## **Section 427 of GEPA**

At Mastery Charter School, we operate high quality charter schools for low-income youth. As part of our standard practice we work to ensure access to, and participation, in all our programs for students, teachers, and other program beneficiaries with special needs. Barriers recognized under this statute: gender, race, national origin, color, disability, or age are all considered by the Mastery leadership and we believe that our programs and services are fully accessible. This document will address both how we remove participation barriers for students, as well as for adult staff, parents, and community members who engage in our programs/schools.

### **(1) Adult/ Staff Access:**

Mastery Charter School has made accommodations for disabled staff at our schools. For example, we have a visually impaired math teacher for whom the following accommodations are made:

- Rather than provide a mastery issued laptop, the teacher requested to use her own specialized computer with Braille adapted keys and for us to load all our software and programs on to her machine. We did this and set up a compatible docking station with large screen in her classroom for her daily use.
- We arranged for her classroom to be close to one of the first floor entrance as she noted that navigating the building on a daily basis would be a burden.
- We arranged to purchase special, large-print teacher's guides for her use, and had professional development materials reproduced in large print for her.
- Since her disability was a challenge to her meeting our typical timelines for turnaround of feedback on student work, we gave her extended time on all feedback and grading to accommodate her vision challenges.



While we have no physically handicapped faculty or staff at the present time, we have had several, as well as having temporarily handicapped staff due to injury. All our buildings are ADA compliant with ramps and elevators, as well as bathrooms accessible for wheelchair use. In cases where a teacher has had a physical disability, we work with him/her to locate their classroom in the most accessible part of the building that will not distract from the academic program. For example, if we have a 12<sup>th</sup> grade teacher with walking limitations and 12<sup>th</sup> grade is on the 4<sup>th</sup> floor, we will not move the teacher to the first floor, however, we will make sure they have easy access to the elevator and will move their classroom closer to the elevator when at all possible. Whenever we host a professional development program off site, we make sure the facility is ADA compliant and that special needs of our participants are accommodated.

## **(2) Student Access:**

The primary ways we comply with ensuring access to our programs for students, regardless of disability, is to fully comply with all regulations in IDEA.

It is the policy of Mastery Charter School that all students with disabilities, regardless of the severity of their disability, who are in need of special education and related services, are identified, located, and evaluated. This responsibility is required by a Federal law called the Individuals with Disabilities Education Improvement Act of 2004, 20 U.S.C. 1200 et. seq. ("IDEIA 2004"). Chapter 711 of Title 22 of the Pennsylvania Code requires the publication of a notice to parents sufficient to inform parents of children applying to or already enrolled in Mastery Charter School of (1) available special education services and programs, (2) how to request those services and programs, and of (3) systematic screening activities that lead to the

identification, location and evaluation of children with disabilities enrolled in Mastery Charter School. The purpose of this Annual Notice is to comply with the school's obligations under Chapter 711 of Title 22 of the Pennsylvania Code. This Annual Notice is made available both in the school's Parent-Student Handbook and on the school's website: [www.masterycharter.org](http://www.masterycharter.org).

### **Qualifying for Special Education and Related Services**

Under the Federal IDEIA 2004, there are two steps for a student to qualify for special education and related services. The first step is a finding that the student has one or more of the following disabilities that interfere with his or her educational performance: (1) autism or pervasive developmental disorder, (2) deaf-blindness, (3) deafness, (4) emotional disturbance, (5) hearing impairment, (6) mental retardation, (7) multiple disabilities, (8) orthopedic impairment, (9) other health impairment (includes ADD, ADHD, epilepsy, etc.), (10) specific learning disability, (11) speech or language impairment, (12) traumatic brain injury, and/or (13) visual impairment including blindness. IDEIA 2004 provides legal definitions of the above-listed disabilities, which may differ from those terms used in medical or clinical practice or daily language. The second step in determining eligibility for special education and related services is a finding by the school's multi-disciplinary team (MDT) that the student with one or more of these disabilities is in need of specially-designed instruction.

### **What Parents Can Do If They Think Their Child May Qualify for Special Education**

Parents who think their child is eligible for special education may request, at any time, that the school conduct a multi-disciplinary evaluation. Some potential signs of a student having a qualifying disability include experiencing years of difficulties in reading, writing or solving

math problems, difficulties focusing and concentrating on schoolwork, difficulties sitting still in the classroom, and difficulties controlling emotions (such as anxiety and depression) and/or behaviors. Requests for a multi-disciplinary evaluation must be made in writing to the school's Assistant Principal of Special Education. If a parent makes an oral request for a multi-disciplinary evaluation, the school shall provide the parent with a form for that purpose. If the school denies the parents' request for an evaluation, the parents have the right to challenge the denial through an impartial hearing or through voluntary alternative dispute resolution such as mediation.

### **Mastery Charter School's Systematic Screening and Referral Processes**

Through our systematic screening and referral processes, Mastery Charter School identifies and refers for evaluation students who are thought to be eligible for special education services. These screening and referral processes include the initial admissions academic placement tests, standardized reading and mathematics assessments, classroom performance, benchmark examinations, vision and hearing screenings, and the comprehensive student assistance program known as C-SAP.

The school regularly assesses the current achievement and performance of the child, designs school-based interventions, and assesses the effectiveness of interventions. The screening of a student by a teacher or specialist to determine appropriate instructional strategies for curriculum implementation is not to be considered an evaluation for eligibility for special education and related services. If a concern can be addressed without special education services, or if the concern is the result of limited English proficiency or the lack of appropriate instruction, a

recommendation may be made for interventions other than a multi-disciplinary team evaluation.

Parents have the right to request a multidisciplinary team evaluation at any time, regardless of the outcome of the screening process. Moreover, screening or pre-referral intervention activities may not serve as a bar to the right of a parent to request an evaluation, at any time, including prior to or during the conduct of screening or pre-referral intervention activities

If parents need additional information regarding the purpose, time, and location of screening activities, they should call or write the school's Assistant Principal of Special Education.

### **Evaluation**

Whenever a student is referred for a multi-disciplinary team evaluation, Mastery Charter School must obtain written consent from a parent before the evaluation can be conducted. Parental consent for an evaluation shall not be construed as consent for their child to receive special education and/or related services. In certain circumstances, a surrogate parent may be appointed. A surrogate parent must be appointed when no parent can be identified; a public agency, after reasonable efforts, cannot locate a parent; the child is a ward of the State under the laws of Pennsylvania, or the child is an unaccompanied homeless youth. The surrogate parent may represent the child in all matters relating to the identification, evaluation, and educational placement of the child. Reasonable efforts must be made to ensure the assignment of surrogate parent not more than 30 days after it is determined that the child needs a surrogate parent.

Under IDEIA 2004, an evaluation involves the use of a variety of assessment tools and

strategies to gather relevant functional, developmental, and academic information about the child, including information provided by the parent that may assist in determining whether the child is a child with a disability and assist in determining the content of the child's IEP. This process is conducted by a Multi-Disciplinary Team (MDT) which includes a teacher, other qualified professionals who work with the child, the parents and other members as required by law. The multi-disciplinary team evaluation process must be conducted in accordance with specific timelines and must include protection-in-evaluation procedures. Mastery Charter School does not use any single measure or assessment as a sole criterion for determining whether a child is a child with a disability and for determining an appropriate educational program for the child. Technically sound instruments are used to assess the relative contribution of cognitive and behavioral factors in addition to physical or developmental factors.

The results of the multi-disciplinary evaluation are written in a report called an Evaluation Report (ER). This report makes recommendations about a student's eligibility for special education based on the presence of a disability and the need for specially designed instruction. If the student's Multi-Disciplinary Team determines that the student is eligible for special education and related services, then a detailed plan for supporting the student in his/her area(s) of need over the coming year is written. This plan is called an Individualized Education Plan or IEP and is written so that the child can be successful in school—and then later in life.

### **Programs and Services for Children with Disabilities**

Mastery Charter School, in conjunction with the parents, determines the type and intensity of special education and related services that a particular child needs based exclusively on the

unique program of special education and related services that the school develops for that child. This program is called an Individualized Education Plan—the IEP—and is different for each student. An IEP Team consists of educators, parents, and other persons with special expertise or familiarity with the child. The participants in the IEP Team are dictated by IDEIA 2004.

The parents of the child have the right to be notified of and to be offered participation in all meetings of their child's IEP Team. The IEP is revised as often as circumstances warrant but reviewed at least annually. The law requires that the program and placement of the child, as described in the IEP, be reasonably calculated to ensure meaningful educational benefit to the student. In accordance with IDEIA 2004, there may be situations in which the school may hold an IEP team meeting if the parents refuse or fail to attend the IEP team meeting.

IEPs generally contain: (1) a statement of present levels of academic achievement and functional performance; (2) a statement of measurable annual goals established for the child; (3) a statement of how the child's progress toward meeting the annual goals will be measured and when periodic reports will be provided; (4) a statement of the special education and related services and supplementary aids and services and a statement of the program modifications or supports for school personnel that will be provided, if any; (5) an explanation of the extent, if any, to which the child will not participate with non-disabled children in the regular class and in activities; (6) a statement of any individual appropriate accommodations that are necessary to measure the academic achievement and functional performance of the child on State and school assessments; and (7) the projected date for the beginning of the services and modifications and the anticipated frequency, location and duration of those services or modifications.

Special education services are provided according to the educational needs of the child, not the category of disability. Types of service that may be available, depending upon the child's disability and needs include, but are not limited to: (1) learning support; (2) life skills support; (3) emotional support; (4) deaf or hearing impaired support; (5) blind or visually impaired support; (6) physical support; (7) autistic support; and (8) multiple disabilities support.

Related services are designed to enable the child to participate in or access his or her program of special education. Examples of related services that a child may require include but are not limited to: speech and language therapy, transportation, occupational therapy, physical therapy, school nursing services, audiologist services, counseling, or training. Related services, including psychological counseling, are provided at no cost to parents.

Mastery Charter School ensures that children with disabilities are educated to the maximum extent possible in the regular education environment or "least restrictive environment". To the maximum extent appropriate, students with disabilities are educated with students who are not disabled. Special classes, separate schooling or other removal of students with disabilities from the general educational environment occurs only when the nature or severity of the disability is such that education in general education classes, even with the use of supplementary aids and services, cannot be achieved satisfactorily. Programs and services available to students with disabilities, might include: (1) regular class placement with supplementary aides and services provided as needed in that environment; (2) regular class placement for most of the school day with itinerant service by a special education teacher either in or out of the regular classroom; (3)

regular class placement for most of the school day with instruction provided by a special education teacher in a resource classroom; (4) part-time special education class placement in a regular public school or alternative setting; and (5) special education class placement or special education services provided outside the regular class for most or all of the school day, either in a regular public school or alternative setting, such as an approved private school or other private facility licensed to serve children with disabilities.

Some students may also be eligible for extended school year services if determined needed by their IEP teams in accordance with Chapter 711 regulations.

Beginning not later than the first IEP to be in effect when the child turns 14, or younger if determined appropriate by the IEP Team, and updated annually, thereafter, the IEP must include appropriate measurable postsecondary goals and transition services needed to assist in reaching those goals. Mastery Charter School must invite the child to the IEP team meeting at which the transition plan is developed.

Beginning not later than one year before the child reaches the age of 21, which is the age of majority for education purposes under Pennsylvania law, the IEP must include a statement that the student has been informed of the student's rights, if any, that will transfer to the student on reaching the age of 21.

### **Services for Protected Handicapped Students, Other Than Special Education Services**

Under Section 504 of the Federal Rehabilitation Act of 1973, some school age children with



disabilities who do not meet the eligibility criteria outlined above might nevertheless be eligible for special protections and for adaptations and accommodations in instruction, facilities, and activities. Children are entitled to such protections, adaptations, and accommodations if they have a mental or physical disability that substantially limits or prohibits participation in or access to an aspect of the school program and otherwise qualify under the applicable laws.

Mastery Charter School must ensure that qualified handicapped students have equal opportunity to participate in the school program and activities to the maximum extent appropriate for each individual student. In compliance with applicable state and federal laws, Mastery Charter School provides to each qualifying protected handicapped student without discrimination or cost to the student or family, those related aids, services or accommodations which are needed to provide equal opportunity to participate in and obtain the benefits of the school program and extracurricular activities to the maximum extent appropriate to the student's abilities and to the extent required by these laws.

These services and protections for "protected handicapped students" may be distinct from those applicable to eligible or thought-to-be eligible students. Mastery Charter School or the parent may initiate an evaluation if they believe a student is a protected handicapped student. For further information on the evaluation procedures and provision of services to protected handicapped students, parents should contact the school's Assistant Principal of Special Education.

### **Confidentiality of Student Information**

Every effort is made throughout the screening, referral and evaluation process to strictly maintain the confidentiality of student information and protect the students' privacy rights. The student C-SAP referral process is a strictly confidential process.

After a referral and evaluation is conducted, a written record of the evaluation results is generated. This is called an Evaluation Report. This report may include information regarding the student's physical, mental, emotional, and health functioning through testing and assessment, observation of the student, as well as a review of any records made available to Mastery through the student's physician and other providers of services, such as counselors. Moreover, the evaluation report contains "personally identifiable information" of the student. *Personally identifiable information* includes the child's name, the name of the child's parents or other family member, and a list of characteristics that would make the child's identify easily traceable. Input from parents is also an information source for identification.

Mastery Charter School protects the confidentiality of *personally identifiable information* by one school official being responsible for ensuring the confidentiality of the records, training being provided to all persons using the information, and maintaining for public inspection a current list of employees' names and positions who have had access to the information. Mastery will inform parents when this information is no longer needed to provide educational services to a student and will destroy the information at the request of the parent. However, general information, such as the student's name, address, phone number, grades, attendance record, classes attended, and grade level completed may be maintained without time limitation.

Parents of students with disabilities have a number of rights regarding the confidentiality of their child's records. The right to inspect and review any educational records related to their child that are collected, maintained, or used by the school. Mastery will comply with a request from parents to review the records without unnecessary delay and before any meeting regarding planning for the child's special education program (called an IEP meeting), and before a hearing should the parents and Mastery Charter School disagree about how to educate the child who needs special education and, in no case, take more than 45 days to furnish parents with the opportunity to inspect and review the child's records.

Parents have the right to an explanation and interpretations of the records, to be provided copies of the records if failure to provide the copies would effectively prevent parents from exercising their right to inspect and review the records, and the right to have a representative inspect and review the records.

Upon request, Mastery Charter School will provide parents with a list of the types and the location of education records collected, maintained, or used by the school.

Parents have the right to request amendment on their child's education records that parents believe are inaccurate or misleading, or violate the privacy or other rights of the child. Mastery Charter will decide whether to amend the records within a reasonable time of receipt of the parents' request. If school administrators refuse to amend the records, parents will be notified of the refusal and your right to a hearing. At that time, parents will be given, additional information

regarding the hearing procedures and, upon request, Mastery will provide parents with a records hearing to challenge information in the child's educational files.

Parent consent is required before *personally identifiable information* contained in the child's education records is disclosed to anyone other than officials of Mastery collecting or using the information for purposes of identification of the child, locating the child and evaluating the child or for any other purpose of making available a free appropriate public education to the child. A school official has a legitimate educational interest if the official needs to review an education record in order to fulfill his/her professional responsibility. Additionally, Mastery Charter School, upon request, discloses records without consent to officials of another school district or charter school in which the child seeks or intends to enroll.

When a child reaches age 18, the rights of the parent with regard to confidentiality of *personally identifiable information* are transferred to the student.

If parents need additional information regarding the Mastery Charter School's policy on educational records and confidentiality, they should call or write the school's Assistant Principal of Operations.

A parent may file a written complaint alleging that the rights described in this notice were not provided. The complaint should be addressed to:

Pennsylvania Department of Education

Bureau of Special Education  
Division of Compliance  
333 Market Street  
Harrisburg, PA 17126-0333

The Department of Education will investigate the matter and issue a report of findings and necessary corrective action within 60 days. The Department will take necessary action to ensure compliance is achieved.

Complaints alleging failures of Mastery Charter School with regard to confidentiality of *personally identifiable information* may also be filed with:

Family Policy Compliance Office  
U.S. Department of Education  
400 Maryland Avenue, SW  
Washington, D.C. 20202-4605

**SUPPLEMENTAL INFORMATION  
REQUIRED FOR  
DEPARTMENT OF EDUCATION GRANTS**

**1. Project Director:**

Prefix: \* First Name: Middle Name: \* Last Name: Suffix:  
Mrs. Courtney A Collins-Shapiro

Address:

\* Street1: 5700 Wayne Avenue  
Street2:  
\* City: Philadelphia  
County: Philadelphia  
\* State: PA \* Zip / Postal Code: 19144 \* Country: USA

\* Phone Number (give area code) Fax Number (give area code)  
(267)688-6868 (215)866-9141

Email Address:

COURTNEY.SHAPIRO@MASTERYCHARTER.ORG

**2. Applicant Experience**

Novice Applicant ☒ Yes ☐ No ☐ Not applicable

**3. Human Subjects Research**

Are any research activities involving human subjects planned at any time during the proposed project period?

☐ Yes ☒ No

Are ALL the research activities proposed designated to be exempt from the regulations?

☐ Yes Provide Exemption(s) #:

☐ No Provide Assurance #, if available:

**Please attach an explanation Narrative:**

**Attachment:**

Title :

File :

# Project Narrative

## Abstract

Attachment 1:

Title: **MCS Expansion Abstract** Pages: **1** Uploaded File: **Abstract CSP Expansion.doc**

### **Abstract: Mastery Charter School Expansion**

Mastery Charter School is a college preparatory K-12 charter school network serving predominantly low-income (84%), minority students (95%) in the high-crime urban communities of Philadelphia. Our expertise is in turning around formerly failing public schools and converting them to excellent charter schools. Mastery schools are created around the vision that we exist to close the achievement gap and deliver break-through results for all children in the communities we serve. Under this model, Mastery was named an Exemplar Charter School by the U.S. Department of Education (1 of 15 nationally), earned the EPIC award for value-added growth two of our campuses in 2009 (only 2/21 charter school winners nationally), and meet or exceed the state average in math and Reading by year four of operation at every school.

The Mastery Charter School Expansion grant will support the creation of 15 new high-quality Mastery charter schools serving more than 8,500 additional students in the cities of Philadelphia and Camden between Fall 2010 and Fall 2014. Grant funds will be used to support one-time start up costs associated with the planning year and first two years of operating each new school. Based on the Mastery financial model, each school becomes fiscally sustainable on per pupil dollars by the end of their third year of operation. A small portion of grant funds will also be used to ramp up Central Office support of the new schools through enhanced teacher training and new teacher coaching programs as we add more than 145 new teachers each academic year for the next five years. Resources will be developed to document Mastery's capacity building initiatives over the next five years so that other charter operators nationally can use these tools in planning expansion efforts. Mastery's Office of Innovation will provide administrative oversight for the expansion project and ensure that objectives are achieved in a timely and efficient manner.



# Project Narrative

## Priorities

Attachment 1:

Title: **Absolute and Competitive Priorities Mastery Charter** Pages: **6** Uploaded File: **Abs and compet priorities CSP Expansion Mastery.doc**

## **PROJECT NARRATIVE: Absolute and Competitive Preference Priorities**

### **Absolute Priority #1: ☒ Condition Met**

Mastery Charter School is a network of high-performing charter schools in Philadelphia, Pennsylvania. We currently operate four charter schools in the city with three new charters opening in September 2010, to bring our total to seven schools for 2010-11. We have an approved charter in New Jersey and plan to open our first school in Camden, New Jersey in September 2011, in addition to two more “turnaround” charters under the School District of Philadelphia’s Renaissance Schools initiative to transform failing public schools in the City. We will open nine (9) additional charters during academic years 2012-13, 2013-14, and 2014-15 in the Philadelphia/Southern New Jersey region, bringing our total number of schools to 19 with more than 9,000 low-income, minority students enrolled by fall 2014.

Mastery Charter Schools are known for quickly erasing the achievement gap for low-income minority schools. All four of our charters opened between 2001 and 2007 meet or exceed the state average in tested grades for reading and math. This achievement is most impressive in our three turnaround middle schools where we took over failing School District of Philadelphia middle schools, converted them to grade 7-12 charters, and within three years had closed the achievement gap for our students – the same low-income, underserved minority students who were enrolled in these failing schools prior to the Mastery takeovers. Evidence of our success as shown in state standardized test results over time can be found in Part A of the Project Narrative and in Section 5: Other Attachments – Student Academic Achievement.

In addition to our strong track record of success with student achievement, are schools are also known as being safe for students and their families. In the City of Philadelphia, where there are more federally recognized Persistently Dangerous Schools than in any other city in the nation, and where one of our turnaround schools was the second most violent public school in the state prior to Mastery’s takeover, Mastery Charter Schools experience almost no incidences of violence on or around school grounds (3 per 100 students per year compared to 16 per 100 students per year in these schools prior to Mastery turnaround). In fact, our “high expectations” culture sets the tone that violence is not acceptable and we have never employed school police officers or used metal detectors in our schools. All faculty and staff are involved in reinforcing our positive school culture and we use a system of Restorative Practices in response to any violations of our Student Code of Conduct.

We also have a history of sound fiscal management as evidenced by clean fiscal audits each year since our operation and we have no knowledge of any statutory or regulatory compliance issues that could lead to the revocation of our charters by the state or the issuing authority.

**Competitive Priority: #1: Low-Income Demographic ☒ Condition Met**

Mastery Charter Schools serve a predominantly low-income minority demographic. In our current seven schools, have an average of **80.51% students who qualify as low-income** defined in this grant solicitation based on data on children eligible for free or reduced-price lunches under the National School Lunch Act as shown in Table 1.1 below.

**Table 1.1: Percentage of Students Enrolled Eligible for Free or Reduced Price Lunch**

Lenfest (2001)	Thomas (2005)	Shoemaker (2006)	Pickett (2007)	Mann (2010)	Harrity (2010)	Smedley (2010)
69.75%	67.70%	70.19%	87.50%	84.20%	90.20%	94.00%

In our application we describe our expansion plan to grow from four charters in 2009-10 to 19 charter schools in Philadelphia and Southern New Jersey by September 2014. Since we have not yet identified the exact student population of the future schools other than the three opening in September 2010, our track record in serving only students in low-income, underserved communities must serve as a proxy for our future student population. We will not seek, or seek grant funding for, any schools where the low-income student population is lower than 60%. In Philadelphia, our new charters are coming from the School District of Philadelphia's Renaissance Schools Turnaround Initiative. At present, 76% of all students in Philadelphia's public schools meet the criteria for low-income, however, in the Renaissance eligible schools, this number is an average of 86%. We would only be taking over new charters from this pool, therefore we are guaranteed to meet the low-income threshold for this grant for new Philadelphia charters. Our charter schools in Camden, New Jersey will serve a similarly impoverished student population, where fully 60% of the residents of the City currently receive welfare, and two in every five residents lives below the United States poverty line in 2010. Sadly for the communities we serve, it is not difficult for the families or their children to meet the low-income thresholds for poverty as stated in the Charter Schools Program grant.

**Competitive Preference Priority 2 -- School Improvement -- ☒ Condition Met**

The expansion of Mastery Charter Schools in Philadelphia is a part of the School District of Philadelphia's "Renaissance Schools" plan to close and reconstitute low performing schools over the next five years. In Section 2: Letters of Support, there is a letter from the School

District of Philadelphia confirming Mastery's current and future role in turning around failing schools in Philadelphia as part of their School Improvement strategy. The School District of Philadelphia has been identified by the State of Pennsylvania as the LEA with the most schools statewide identified for improvement, corrective action, closure, or restructuring under section 1116 of the ESEA. Mastery takeovers of District schools under the Renaissance plans include only Tier I schools per the School Improvement Grant guidelines published on December 10, 2009 and they follow the federally approved "restart model" for converting failing schools to charters.

In 2009-10, the School District of Philadelphia created a **School Performance Index (SPI)** to determine how District schools were doing compared to one another beyond simply using AYP status. Each school received a score of 1-10 (10 being lowest) in each of two categories: (1) overall rank compared to all schools District-wide (10 decile bands) and (2) overall rank compared to the 10 most similar schools by grade configuration and student demographics (poverty, minority student subgroups, Special Education, and ELL students). The SPI is weighted by school in three areas:

- Student Progress (50%) – Individual student PSSA growth year over year
- Student Achievement (40%) – Achievement Gap, PSSA Proficiency and Below Basic Levels for subgroups (low income, African American or Latino, Special Education, English Language Learners)
- Student Engagement/Parent Satisfaction (10%) – Student Attendance, parent satisfaction results (survey)

Between 2010 and 2014, the School District's Strategic Plan calls for closing at least 35 schools with a 10/10 score on the SPI and either turning them around in-District or turning them over to

charters. Evidence of demand for Mastery charters is real: this spring, five Philadelphia school communities voted to become Mastery schools, however, our fiscal and human capital capacity only allowed for us to take over three schools in Fall 2010. Documentation of the votes from the three schools matched with Mastery, the members of these councils, and their rationale for selecting Mastery has been included in Section 2: Letters of Support. This fall we will reopen these schools as charters with 98% new faculty, all new administration, new books, materials, and curriculum, and a physical makeover to the facility. We will follow our successful turnaround strategy and expect nothing less than stunning success in year one and to close the achievement gap in each school by year three. Mastery has now been pre-approved to compete for all Renaissance eligible schools through 2014 and we are planning for these charter conversions as a key to our expansion strategy as the path to new charters has been expedited by the School District for any charter operator taking over a Renaissance school.

**Competitive Preference Priority 3 -- Matching ☒ Condition Met**

The New Schools Venture Fund and a private philanthropist have agreed to provide up to \$2,000,000 or 25% of the total grant award in matching funds, based on a final award from the U.S. Department of Education to Mastery Charter School. A letter of verification from each funder has been included in Section 2: Letters of Support of this application confirming both the dollar amount and their commitment to transfer the funds to Mastery Charter School at the time any award is announced by the U.S. Department of Education.

# Project Narrative

## Project Narrative

Attachment 1:

Title: **Mastery Project Narrative** Pages: **55** Uploaded File: **CSP Narrative v4 ccs sg DOE compat.doc**

## **Expanding High-Impact Charter Schools**

Part A: Quality of the Eligible Applicant	Pages 2-21
Part B: Contribution in Assisting Educationally Disadvantaged Students	Page s 21-27
Part C: Quality of the Project Design	Pages 27-33
Part D: Quality of the Management Plan	Pages 33-53
Confirmation of Application Requirements	Pages 53-55
Absolute and Competitive Preference Priorities –	Attached
<i>OTHER ATTACHMENTS (End of Page Limits):</i>	
Section 1: Resumes of Key Personnel	
Section 2: Letters of Support	
Section 3: Proof of Non-Profit Status	
Section 4: Other Attachments: Schools Operated by Mastery	
Section 5: Student Achievement Documentation	
Section 6: Supplemental Budgets and Financial Information	
Section 7: Other Attachments (e.g. Organization Charts, Instructional Standards)	



## **Project Narrative**

### **SECTION A: QUALITY OF THE ELIGIBLE APPLICANT**

#### *Mastery's Turnaround Success – Closing the Achievement Gap*

Mastery Charter School has created an effective model for turning chronically low-performing District schools into successful charter schools. In 2005, 2006, and 2007 we took over the managements of three unsafe, failing District middle schools with predominantly low-income, minority children and converted them to Mastery charter schools. Test scores on the PSSA (Pennsylvania State Standardized Assessment) in those schools have increased an average of 52 points in math and reading across both 7<sup>th</sup> and 8<sup>th</sup> grades. Two of the schools have closed the achievement gap in math and reading at the 8<sup>th</sup> grade level and third, most recent, turnaround has done so in math and is a few points away in reading. As a result of these successes, Mastery has been recognized as a national model for school turnarounds. In 2005 the U.S. Department of Education recognized Mastery as an “exemplar charter school,” and in fall 2009 Secretary Duncan visited and lauded the Mastery Shoemaker campus and the Department of Education cited Mastery as the national example for its “restart” turnaround model.

In 2010, Mastery Thomas, Mastery Lenfest, and Mastery Shoemaker Campuses were three of just 21 schools across the country to earn the EPIC (Effective Practice Incentive Community) Award, a federally supported program to recognize charter schools that demonstrate the highest value-added student gains each year. Shoemaker was recognized as the highest value added middle school in the country. Pickett, our most recent turnaround, was a runner up in the

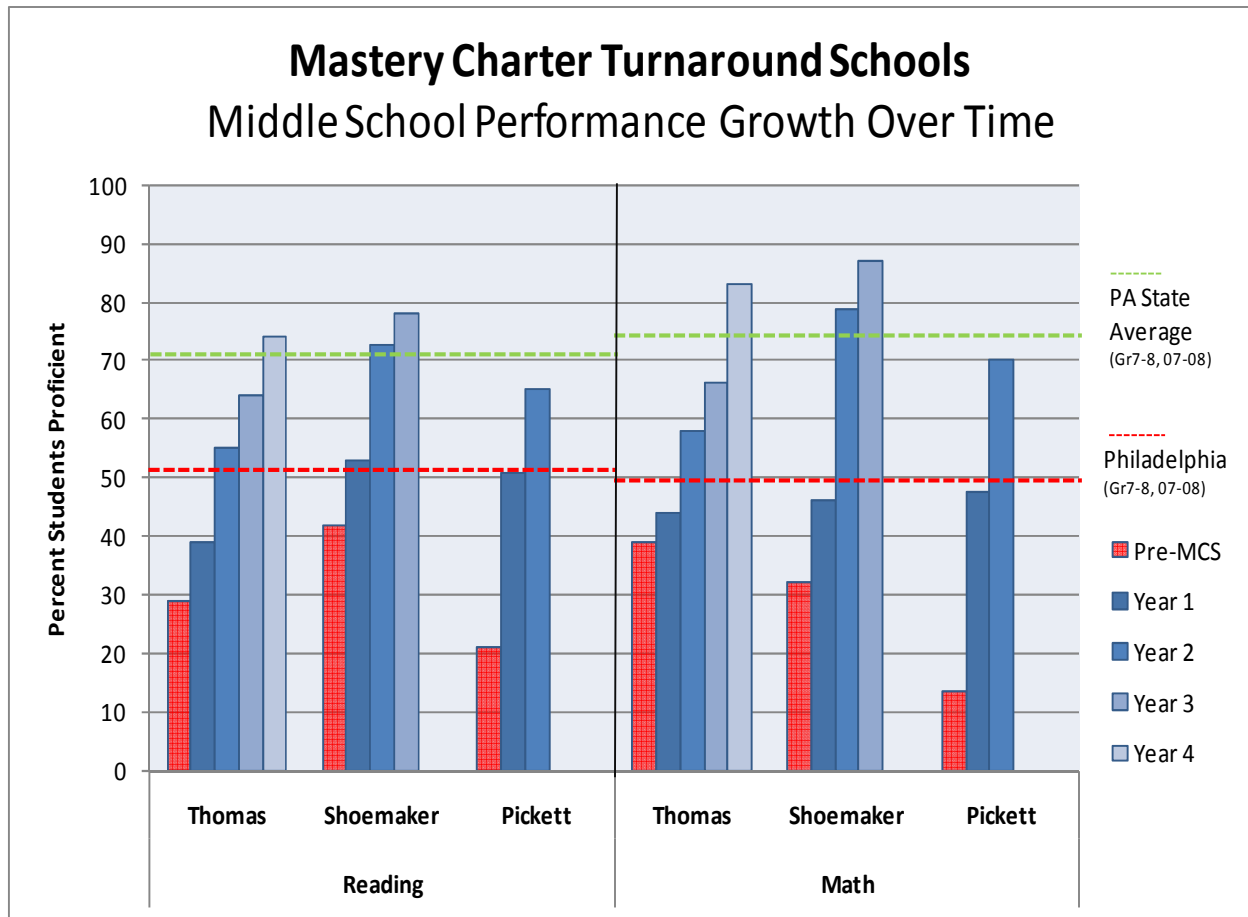
EPIC competition. Taken together, these honors indicate that Mastery is able to consistently produce breakthrough results through its systems and programming.

<i>Mastery's Success with Educationally Disadvantaged Students</i>
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The students enrolled in Mastery schools are predominantly low-income (84.79% as evidenced by eligibility for free or reduced-price lunch), from underrepresented minority groups (90.82 African American), and were performing an average of two years behind grade level in reading and math when they started at Mastery . As can be seen in Exhibit A-1, Mastery enrolls these students in their formerly failing schools and transforms them into high achieving students.

Exhibit A-1 shows our three turnaround schools' growth over time as measured against the School District of Philadelphia test averages (lower dotted line) and the Pennsylvania state averages (higher dotted line) in 2009. Both our Thomas and Shoemaker turnaround schools (started in 2005 and 2006 respectively) have both already exceeded the state averages in reading and mathematics. Our Pickett campus, only in operation for two years as of the 2009 state testing period, was within 5 percentage points of the state average – exceeding the trajectory to beat the state average within four years. While Pickett is our newest school and not yet our most accomplished, we are highlighting their results in this section of the narrative in detail as an example of how quickly and how well Mastery has been able to effect a total school turnaround. Pickett's accomplishments are all the more impressive when one considers the school's remarkably low performance prior to Mastery take over in 2007. Prior to Mastery's turnaround, Pickett had a 21% student attrition rate from September to June, 14 incidents of school violence reported to the state for every 100 students enrolled, 86% daily attendance, and fewer than 10% of the students in 7<sup>th</sup> grade

**Exhibit A-1: Mastery Charter Turnaround Performance Growth 2005-2009**



*\*If printed in black and white, most recent year is furthest to right. State/Phila avs are dotted lines*

proficient in either reading or math. In just two years of operation, 7<sup>th</sup> grade scores have risen 54 percentage points in math and 49 percentage points in reading, far exceeding the School District's average and now within five points each of the state averages for this grade level. Under Mastery, our student attrition rate decreased to 10% by 2010, school violence decreased to 2 incidents for every 100 students enrolled, and daily attendance is up to 94%. The school's 7<sup>th</sup>

grade class continues to be fed by two District elementary schools in the same low-income, high-crime neighborhood as before the turnaround. In fact, the school's student demographics are the same three years after the turnaround as before (99% African American, 86.4% low-income, 22% special education), yet as a group these students are now matching the performance of many of their peers in affluent, predominantly-white suburban schools in our region.

One other educationally disadvantaged group we must mention here is special education students. Mastery serves special education students at all campuses and the academic achievement of these students has skyrocketed under Mastery's management. For example, at the Pickett Campus (which has a 22% special education population) the percentage of 8<sup>th</sup> grade students scoring below basic decreased from 47% in 2007 before Mastery to 13% in 2009 under Mastery. We have a dedicated Director of Special Education guiding all Mastery schools and plan to undergo a large-scale assessment and enhancement of our Special Education program in 2010-11. In Section B of this narrative, we provide more detail on PSSA growth for special education students Network-wide.

To respond to this grant's requirement to provide comparison data on schools demographically similar to Mastery schools, we have provided information on the School District of Philadelphia's SPI – School Performance Index (see pages iv-v of the Competitive Priorities Section attached to this application) ranking system. The SPI ranks schools into deciles based on student test scores and growth. The District compares schools both to the District as a whole and to a subset of 10 demographically similar schools. Under the District's "Renaissance Schools Initiative" only schools that are in the bottom 10% of all District schools, are in the bottom 10% of demographically similar schools, and that have been in Corrective

Action under No Child Left Behind for at least five years will be eligible to be converted to charter school for turnaround. Thus Mastery's future new turnaround charters will absolutely enroll low-performing students who live in high need communities. Individual school performance data charts documenting our success are available for review in Section 5: Student Academic Achievement.

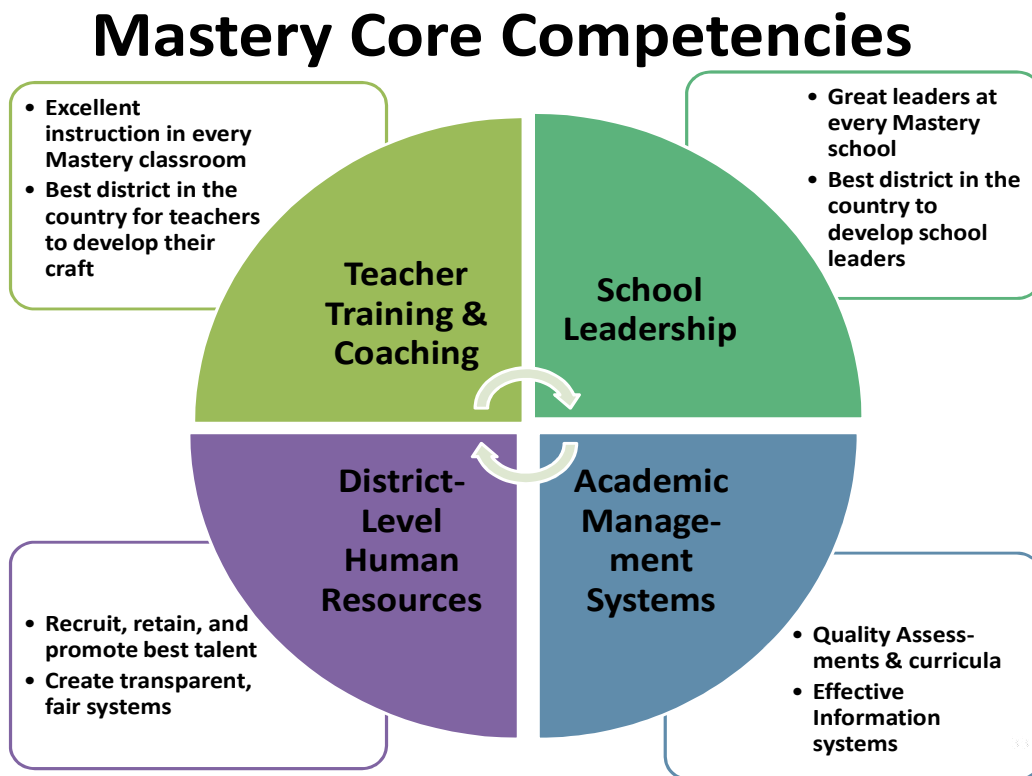
<u><i>The Mastery Academic Model</i></u>
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In the qualifications section we will detail how our educational program will be implemented in the future new schools to enable *all* students (including all educationally disadvantaged students) to meet challenging state and college-ready standards. Few education challenges are more complex than successfully turning around low-performing schools. Mastery has succeeded in this complex task, developing a successful instructional and management model and replicating that model in three of the most violent and low-performing middle schools in Philadelphia.

To do this, Mastery has developed sophisticated systems and a network infrastructure around four core competencies as detailed in Exhibit A-2: Teacher Training and Coaching; School Leadership; District-level Human Resources; and Academic Management Systems. Excellence in these four core competencies ensure consistent, successful replication because we believe they are the key drivers of school success.

Teacher Training and Coaching: Mastery clearly defines and measures quality instruction. We provide intensive supervision, coaching, and ongoing professional development for teachers to ensure there is quality instruction in every Mastery classroom. Key initiatives include:

## EXHIBIT A-2: Mastery Core Competencies



- *Mastery Instructional Standards:* Mastery’s instructional standards are intended to describe quality instruction and provide a common language for best teaching practices. The standards were developed from three primary sources; 1) the work of Madeline Hunter, an icon of the pedagogical field from the mid 80’s, 2) Doug Lemov’s technique-driven framework as described in his recent book “Teach Like A Champion”, and 3) best practices from master Mastery teachers. The Instructional Standards are organized by five standards : 1) Objective Driven Approach, 2) Classroom Systems, 3) Instruction, 4) Student Motivation, and 5) Rigorous Engagement. Each standard includes a series of

strands that describe both student outcomes and teacher actions in clear, concrete and observable language. The complete standards are included in Section 7: Other Attachments of this application . Teachers are observed between at least 10 times per year and all feedback is summarized in mid-year and end of year formal evaluations . There are three means of observation at Mastery: :

- *Quick Visit (QV):* These occur five (5) times per year and are short, five-minute informal observations on one of the 5 instructional standard strands. All QVs are unannounced;
- *Targeted Observations:* These unannounced observations occur 3-4 times per year (once or twice each semester), last 20 minutes each and focus more deeply on an entire instructional strand. For example, if the principal or other instructional leaders is looking at standard #5 “Rigorous Engagement”, s/he will focus on the student outcome of “work hard” and the teacher actions of “instructional density, release of responsibility to students, grabbing engagement, and high order engagement” to gauge teacher mastery of the standard.
- *Formal Observations:* Formal observations occur twice per year for advanced and master level teachers, and three times per year for associate and senior associate teachers. (*Note:* More detail on teacher levels at Mastery can be found Section 7: Other Attachments in the Teacher Handbook, which details all teacher levels). These observations cover an entire class period including a review of the teacher’s lesson plan for that day and samples of evaluated student work.

Teachers receive written and verbal feedback after every observation and are active participants in discussing and analyzing the feedback. The high volume of rigorous

evaluations is supported by both school-level leaders and centralized Mastery instructional coaches. In addition to the principal, each campus has an Assistant Principal for Instruction whose primary role is to supervise and coach teachers, as well as one or more Apprentice School Leaders (individuals who spend the year learning Mastery systems so they can step up to an Assistant Principal or Principal role the following year) ) who also assist with teacher observations and coaching. Finally, Master teachers within each school also coach more junior teachers. This team of professionals is rigorously trained on the observation protocols and evaluation rubrics and focuses on ensuring teachers master the instructional standards. Finally, instructional coaches based out of the Mastery network office are allocated to each campus to coach and train teachers.

- *Coaching:* All Mastery schools provide individualized 1:1 coaching for new teachers. The coaching focuses on the Instructional Standards and how to use data to drive instruction. Each new teacher participates with their coach for six, intensive weeks, after which the coaching team determines which new teachers need ongoing 1:1 coaching or an individualized training plan . Coaches are extensively trained by Mastery so they can provide consistent messaging on the instructional standards and evaluation rubrics.
- *Professional Development:* All teacher training sessions are designed by the principal and school leadership team, with the support of the Mastery network office instructional team. School leaders use their teacher observation and student performance data to select professional development topics, create trainings, and deliver timely sessions relevant to teacher and student needs. Mastery has built a library of professional development content on each sub-element of the Instructional Standards so that when a school determines that their teachers are struggling with a particular practice, Mastery can easily



build an effective training to meet that school's need. The library includes facilitator outlines, copies of resource materials, and video vignettes of actual Mastery teachers showing best practices. To customize their professional development, school leaders modify the materials and include teachers from their campus who are experts on the highlighted practice to deliver the most relevant training possible. Time is set-aside for professional development at Mastery schools -- every Wednesday school ends early so teachers can have two hours of professional development and team planning. Mastery's Professional Development and Coaching Division spearheads our training and coaching efforts and is continually learning and sharing best practices from Master teachers at all Mastery schools as well as those from other highly effective schools nationwide. .

School Leadership: Mastery believes that successful schools require both great teachers and great school leaders . As with teachers, to ensure great leaders at every Mastery school, we have invested heavily in creating leadership standards and a training and coaching infrastructure to support school leaders. Key initiatives include:

- *Apprentice School Leaders:* One year prior to opening a new Mastery school, we hire a cohort of Apprentice School Leaders (ASLs). This allows us to have a “bench” of future principals and assistant principals who have been trained in the Mastery model. When we open new schools, ASLs are ready to step up and serve as leaders. We piloted the ASL model in 2009-10 and it enabled us to staff the leadership teams at the three new charter schools scheduled to open in Fall 2010 with 80% internal ASL trained staff. The ASL program was piloted with private grants and this application seeks support for the ASL program going forward to fuel our growth plan.

- *Management Standards:* As with instruction, we believe the foundation for effective training and coaching of school leaders is clearly defining what Mastery management is. Mastery has created a series of management standards that describe some of the key management skills we believe effective school leaders require. The Mastery Network Office has created trainings on each of these management standards and is beginning to create a common language and resource library for school leaders. These trainings are delivered as part of new school leader orientation and throughout the year. As will be described below, school leaders' management effectiveness is evaluated using these standards as a framework.
- *Leadership Coaching:* Mastery believes that, like teachers, leaders develop through close supervision, feedback, and coaching. To ensure school leaders receive this type of ongoing support, we have created Regional Directors who supervise and support up to six Mastery schools and their leadership teams. The role of the Regional Director is to provide hands-on supervision and support – primarily to the school principals but also the larger leadership teams – through regular school walk-throughs, data reviews, and management team observations. Mastery has intentionally created a relatively low 1:6 Regional Director to school ratio because we believe that effective coaching requires deeply engaged supervision.

District-Level Human Resources: To successfully scale, we believe we must have effective and transparent systems to recruit, retain, and promote the best talent. This includes:

- *Recruitment Team:* As we have expanded our charter network, we have expanded our Talent Development department to recruit staff who fit with the Mastery model. We have created a rigorous screening process including resume filter, phone interview, live interview, and demonstration lesson in front of Mastery students. This fall, we are doubling in size as an organization (from 4 schools with 2,000 students to 7 schools with 4,100 students). To do this, we hired three new leadership teams and 140 new teachers. We have built the capacity to be able to bring in a large numbers of quality new staff each year. We will continue to develop our human resources infrastructure as we grow rapidly over the next five years.
- *Performance Based Compensation/Promotion:* We believe to effectively scale Mastery, we must ensure that pay and promotion must be aligned with outcomes and effectiveness. Consequently we have created performance-based compensation systems for both teachers and school leaders. These systems align expectations, professional development and support, and pay with student outcomes. The performance-based nature of the systems enable us to attract and retain the best teachers and leaders, support and improve struggling staff members, and exit non-performers. In the aggregate, the systems nurture a culture focused on results. The systems work as follows:

  - Mastery's pay scale for teachers is organized around four professional "levels: Associate, Senior Associate, Advanced, and Master. Most teachers enter Mastery at the Associate or Senior Associate level. Teachers have annual contracts and receive an annual raise within each level or promotion to the next level based on three criteria: 1) their student's academic growth and achievement, 2) instructional quality as measured by observations using the Mastery

Instructional Standards, and 3) mastery values. Teachers can receive pay increases significantly higher than they could receive in a traditional “step” pay or receive only minimal increases (or even contract termination). We have found that the system engenders a culture focused on results and ongoing professional development and reflection.

- Mastery school leaders’ compensation is designed similar to system we employ with teachers. Pay scales for leaders are organized around three “levels”: Senior, Advanced, and Master. Leaders receive an annual raise within each level or promotion to the next level based on three criteria: 1) school outcomes including students’ academic growth and achievement, school culture metrics, etc. 2) management quality as measured by feedback from staff and supervisor using the Mastery management standards as a guide, and 3) Mastery values. Like teachers, leaders can receive pay increases significantly higher than they could receive in a traditional “step” pay or receive only minimal increases (or even termination). The system engenders a results focused culture that reinforces our motto: “Excellence. No Excuses.”

- Human Resources Information System (HRIS) – Mastery’s HRIS enables us to link student performance to teacher performance and pay systems. It also allows us to collect and report accurate data on teacher retention, performance, evaluation, and feedback. As we grow, this system will be critical to scaling our Human Resources capacity.

Academic Management Systems: Mastery’s fourth core competency is the systems that support and enable instruction in the classroom including:

- **Curricula and Assessments** – Over the last nine years, Mastery has developed robust 7-12 curricula and assessments. Mastery curricula is aligned with Pennsylvania state standards and we are already looking at the new Common Core to ensure our students are meeting these standards at each grade level in each subject. This year we will open our first elementary schools, and to ensure quality curricula at that level, , we partnered with Achievement First (an award-winning charter school operator recognized by the U.S. Department of Education for the success of their elementary schools in closing the achievement gap). Using Achievement First materials as a base, we have developed robust K-6 curricula and assessments. We review our curricula each year in light of student results to constantly revise and improve materials to ensure we offer the most rigorous, engaging curricula to achieve breakthrough results with our students.
- **Benchmarks and Predictive Exams** – To measure students learning and provide actionable data for teachers, Mastery has created a comprehensive series of benchmark assessments – each aligned with a specific subset of Pennsylvania standards that the curricula covers in a given six week report period. Each question in the benchmarks are aligned with a specific standard so teachers can use the results to identify which students are not mastering which specific standard. Mastery has developed and refined its benchmark assessments over the last five years in reading, math, writing, science, history/social studies, and Spanish at every grade level. Mastery’s instructional model revolves around teachers’ use of benchmark (and other assessment) data to drive planning and daily instruction. Mastery has also developed a “portfolio” of teacher designed key assignments, authentic assessments, and summative unit assessments that have been tested and vetted across the Mastery system. Together with the benchmark assessments they provide the backbone for Mastery’s academic system.

- Mastery Value Added System (MVAS) – While Mastery has used student achievement data to understand teacher performance for several years, we have recently built and launched a value-add system to be able to understand actual growth for students with different incoming levels. While this is extremely valuable in helping us understand which teachers are making the most gains with students over the course of a year, it is also an actionable tool so that teachers can alter lesson plans daily or weekly based on student progress in their subject area. Sample classroom-level data from MVAS is included in Section Seven: Other Attachments.

<i>The Mastery Model in Practice at Each School – What Does it Look and Feel Like?</i>
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Mastery’s entire school program is derived from our mission statement:

*All students learn the academic and personal skills they need to succeed in higher education, compete in the global economy, and pursue their dreams.*

We believe that educational inequity is the most pressing social problem facing our country—the civil rights issue of our day. Mastery exists to solve the problem. We believe it is imperative that every child receives a quality, college-preparatory education. Mastery insists on high expectations and high support so all students can achieve success. We live by our motto: “Excellence. No Excuses.”

Our middle and high school design is based upon the program we have successfully implemented over the last 5 years at our Thomas, Shoemaker, and Pickett turnaround schools. Our elementary school design has been developed based on our partnership with the Achievement First Charter Network. Over the last year, we have traded curricula with Achievement First, learned their school design, and trained Mastery leadership on site at their

elementary schools. This training included placing Mastery staff and Apprentice School Leaders at Achievement First Schools for 3 month apprenticeships during the academic year.

### Key Elements of Mastery Schools

There are six key design elements common to our elementary and high school models:

- 1. High Expectations School Culture:** A positive, orderly, achievement oriented school culture is paramount to a successful school turnaround. Mastery intentionally fosters a “success through work hard” culture. We create an achievement-focused school culture by sweating the small stuff while fostering meaningful, personalized relationships between students and adults. Our school culture program includes:
  - **School Culture Team & Relationship-Driven Security:** A dedicated team including Director of School Culture, Deans of Students and Social Workers, is responsible establishing quality, personal relationships between students and adults – the most effective way to create and maintain a safe school environment.
  - **Restorative Practice & Non-Violence:** Mastery disciplinary systems focus on relationships and raise attention to the harm done to victims, offenders, and the overall community. Non-violence is an ongoing school theme.
  - **College Focus:** Beginning in kindergarten, Mastery constantly delivers the message: “you are going to college.” In high school, all students take an SAT prep course and college-readiness course.
  - **School-Wide Behavior Systems:** All teachers adopt school-wide classroom behavior systems that provide immediate feedback to students for positive and negative behavior.

- School Values & Code of Conduct: Mastery's mission statement and values (elementary level) or code of conduct (middle-high level) serve as the foundation of our school culture and disciplinary system.
- School Culture Rituals and Programs: These include uniforms, community meetings, classroom circles, and award systems.
- Mastery Grading & Promotion: Traditional A thru F grading is not consistent with Mastery's goal of ensuring all students master the skills and knowledge they need. Instead, in grades 7 through 12, Mastery uses a "Mastery" and "Incomplete" system. Students "Master" a course by attaining a grade of 76% or above. Anything less is considered "Incomplete" and must be revisited. Middle and High School courses are typically a year in length and comprised of two semesters. Each semester is worth one credit. Any credit that is not mastered must be made up in summer school. If a student misses four of the eleven yearly credits, or if they fail a summer school course, they are retained and must repeat the grade the following year. This mastery-based promotional structure has been effective in motivating students.
- High School Internship : 10<sup>th</sup> grade students must complete an 18-week internship in a local business or workplace that occurs each Wednesday from 1-5pm. Before the internships, students receive instruction on workplace culture, beginning with how to shake hands and ending with interviews with real employers. Internships occur at a variety of organizations including law firms, hospitals, after-school programs, restaurants, technology and financial services companies. We recently moved the internship component from 11<sup>th</sup> to 10<sup>th</sup> grade as our students and staff noted a need to



connect career trajectories to the college admissions process that is heavily focused in 11<sup>th</sup> grade.

**2. Aligned Curriculum & Assessments –**

Our academic program was designed by starting with the end point – the knowledge, academic and personal skills that students must learn by graduation in order to be prepared for higher education and the global economy. We then back mapped these skills by grade level and subject down to kindergarten. Mastery embeds Pennsylvania standards into each grades' curricula with each grade strategically and sequentially building upon the skills mastered in the previous grade. Each grade level is defined by the measurable learning outcomes that students will learn and achieve. Grade level standards are then sub-divided into six week report periods with each period covering a specific set of skill standards and students' learning of those standards assessed by our benchmark exams six times per year. We have adopted this intentional, focused, standards-based approach because it clarifies for teachers and students the skills and content that need to be taught and mastered . Nothing is left to chance. It ensures coherence and consistency across classrooms to support student learning.

**3. Outstanding Teachers –** described in detail on pages 6-10.

**4. Data-Driven Management & Instruction --** Data systems are described on pages 13-15 and copies of our Mastery Value Added System reports are included in Section 7 attached to this application. Mastery uses data on a constant basis to drive every decision from the individual student, classroom, school, and network level. As was described earlier, assessment data drives instructional planning and delivery. While teacher use of instructional data systems is one key to our success, we also believe in using data to drive

operational decisions related to human resources, fiscal stability, and facility planning. One of our core values as an organization is *continuous improvement* and we are committed to using all forms of data to improve practice.

5. **Literacy Focus:** Mastery believes the foundation of student achievement is reading. The National Research Council has found that “Academic success, as defined by high school graduation, can be predicted with reasonable accuracy by knowing someone’s reading skill at the end of 3rd grade.”<sup>1</sup> Perhaps the biggest challenge in turning around a low performing school is addressing students’ reading deficits.

At the K-2 level, Mastery dedicates three 50 minute periods daily to reading instruction in addition to a dedicated read aloud block and writing class. Every two K-2 classrooms has a shared literacy teacher and utilize self-directed computer-based instruction so the classroom can be subdivided into small reading groups of 8-10 students. Students rotate between Reading Mastery, Guided Reading , and Destination Reading software. Students are homogenously grouped so that teachers can target the specific learning needs of students. After initial student placement testing, students work in fluid groups that are constantly reassessed to ensure proper placement

From grade 3-5, students continue with Reading Mastery and extend into literature study, language and word study, and a writing class. In grades 6-12 the curricula is primarily novel based. Students with significant reading deficits will receive an additional targeted intervention block that may include Corrective Reading by SRA McGraw Hill, Rewards by Cambrium Learning, or AMPS Reading System by Pearson.

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<sup>1</sup> National Research Council (1998) <http://www.ed.gov/initiatives/americanreads/ReadDiff/> accessed on 12/14/04. In addition, in his review of high-performing, high poverty schools, Samuel Casey Carter, concludes that a laser focus on basic literacy and math in the early years of schools was a central commonality among high-performing elementary schools. Casey, Ibid., p. 28.

## 6. Comprehensive Student Supports

- *Scaffolded Course Structure: Multiple Entry Points, Single Exit:* In a school turnaround, we recognize that students will be at dramatically varying skill levels – from functionally illiterate to above grade level. At the middle-high level, this wide skill disparity can be particularly challenging. To effectively meet students at their incoming skill levels, we offer multiple course options in 7<sup>th</sup>-12<sup>th</sup> grades.

Students with lower reading skills receive coursework that is specifically designed to accelerate reading skills. Similarly, in math, high school students who are significantly below grade level take a year of pre-algebra or remedial math and the following year move on to the next level math course. Our goal is by their third year at Mastery, all students are engaged in the same grade-level appropriate rigorous pre-college coursework

To ensure students catch up quickly, these accelerated entry-level “ramp-up” courses are typically limited to 20 students or less per class. This structure ensures that all students get the support they require and receive the college preparatory coursework they need.

- *Support For Struggling Students:* Our six week benchmarks allow us to identify struggling students before they fall too far behind. Struggling students receive differentiated instruction, additional tutoring, or pull-out support. Students that are identified as having a persistent barrier to their academic success, despite early school supports, are referred to the Student Assistance Program (SAP) team. The SAP team is responsible for evaluating the issues and identifying supports and services to aid the student in overcoming these barriers.
- *Social-Emotional Skills Instruction.* Mastery believes social-emotional skills can be

explicitly taught and nurtured. At the elementary level we use curricula from the Responsive Classroom and The Incredible Years to teach these skills. At the middle and high school level, students take social emotional courses (daily in 9<sup>th</sup> grade, twice weekly in other grades) taught by dedicated teachers. In grades 7 and 9, the social emotional courses focus on decision skills, conflict resolution, and emotional self-management.

- *More Time:* Mastery operates a longer school day and year than traditional public schools. The typical school day is 8 hours compared to 7 in area public schools. Our school year starts in late August and runs until the end of June (compared to mid-September to early June for area public schools). Homework is another way to create additional learning time.<sup>2</sup> We build the habit of “homework time” by assigning kindergarteners 30 minutes of homework each night, increasing to 60 minutes per night in third grade, 80 minutes per night by fifth, and 120 minutes by 9th.

The information provided in this section provided a snapshot of our model. For more details, please review the documents in Section 7: Other Attachments (Instructional Standards, Teacher Handbook, MVAS documents). Our intent is to communicate that our success is a consequence of implementing a comprehensive, well documented and supported school model that can be replicated in 15 new charters over the next five and achieve the same breakthrough results for children we have achieved in our current four schools.

## **SECTION B: Contribution in assisting educationally disadvantaged students**

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<sup>2</sup> A recent study of the link between homework policies and academic success found that “excellent schools assign significant homework.” See: H, Cooper, J. Lindsay, & S. Greathouse, “Relationships Among Attitudes About Homework, Amount of Homework, and Student Achievement,” *Journal of Education Psychology*, (Vol. 90, No. 1).

Mastery's expansion from 4 to 19 charter schools over the next five years – with nearly all 15 new schools being turnarounds of failing public schools – will serve students who live in poor neighborhoods in Philadelphia and Camden where outstanding public schools have been absent for generations of residents. More than 84% of current Mastery students are low-income and more than 95% from disadvantaged minority groups. Serving these students will continue to be our focus. In Section A, we described how Mastery's low-income and minority students are excelling in our schools and how we have closed the achievement groups for these students in a short period of time (refer to pages 3-6 to review the data). In addition, our African American and Low-income students significantly outperform their peers statewide in Reading and Math. Our schools are predominantly African American ( $\geq 90\%$ ) and low-income ( $\geq 84\%$ ), and these two subgroups' achievement scores are within 1 percentage point of the school-wide averages at every grade level.

Our Special Education students, while not reaching the same level of achievement as our regular education students, have made significant progress – in particular as evidenced by the dramatic reduction in the numbers of special education students in the “below basic” category on the PSSA, Pennsylvania's high stakes exam in Reading and Math (please refer to page 5 on below basic statistics and to Section 5: Student Academic Achievement Attachments listing each school's percent of students below basic per year). In addition, we have seen consistent gains for special education students at all campuses in Reading – the top focus for our schools with special education students. In Exhibit B-1 below, we show the Mastery PSSA scores and gains for special education students between 2006 and 2010 in Reading. This year, 3 out of 4 schools increased the percentage of special education students achieving proficiency and

## EXHIBIT 2.1: PSSA Gains in Reading for Special Education Students in Grades 7 and 8

	Grade 7					Grade 8					Gain Scores			
	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010	2007	2008	2009	2010
Lenfest				25	22					44				+19
Thomas	14	0	14	38	17	8	20	30	25	64	+6	+30	+11	+26
Shoemaker		13	0	6	8		17	54	20	46		+41	+20	+40
Pickett			0	21	8			0	16	33			+16	+25

advanced by 25% or more, and our Lenfest campus made a gain of 19%. We must do more to increase proficiency levels for our special education students; however, our schools are making progress with this high-need population.

We expect that nearly all students enrolled at Mastery Charter schools will fall into the statistical category of “at-risk” established by No Child Left Behind, given the combination of factors that surround them (84% free-reduced lunch, 95% of color, 94% of parents did not go to college, 17% IEP, etc.). However, Mastery is founded on the principle that all students can achieve greatness. Therefore, each school is dedicated to meeting every student’s individual needs using a variety of learning supports and tools:

- Clear, engaging, high-quality lessons in the classroom aided by a low student to teacher ratio
- The increased learning time
- Pull-out and push-in instruction by our special education staff and related service providers such as speech, occupational, and physical therapy

- Mandatory after school and Saturday program tutoring for students who require additional individual and small-group attention

All of these strategies and supports ensure that students with disabilities, students with limited English language proficiency, and students “at-risk” of academic failure meet the high, college-preparatory standards that we set at Mastery.

*Special Education:* While it is impossible to predict the specific needs of the students we will serve, we have built support for students with disabilities into our school plan. Each school will have an Assistant Principal of Special Education, dedicated special education teachers, a full time social worker, and a part time school psychologist. All special education staff will be appropriately trained, certified, and licensed. In addition, several aspects of our school design have been demonstrated to aid all students, including those with disabilities, in achieving academic success. The practices include having a strong basis in phonics as part of our reading program, having dramatically increased instructional time, and having a uniform and explicit behavioral and discipline code.

*Students with Emotional and/or Behavioral Issues:* Students who have very serious emotional and/or behavioral disabilities are served by the Mastery Alternative Pupil Support (MAPS) program. This program provides intensive structure and counseling support for students. Class size is limited to 12 students taught by a teacher and instructional assistant. Based on a positive behavior support model, MAPS prepares students with the personal and social skills they to be successful in school and in life. Students receive group or individual therapy twice each week.

*English Language Learners:* Mastery Charter School’s approach to ensuring success for ELL students will be a process of structured immersion. Through our extended school day and

extended school year, ELL students will have dramatically increased exposure to English speaking, reading, and writing. This will speed their acquisition of English. All ELL students at Mastery schools will be held to the same academic standards as all other students. ELL students will receive individualized support in their efforts to reach and surpass these standards. This approach is borne out of our mission to ensure the academic success of all students.

In addition to high academic achievement as evidenced by meeting and exceeding state standards, Mastery aims to have all students *college ready* by the time they graduate. In 2009-10 we contracted with the National Student Clearinghouse to compile college enrollment and persistence data on our first four graduating classes from Mastery and data going forward. While we do not yet have a graduation cohort with six-year college participation data, the initial review of the data shows our students' college persistence levels are significantly higher than the national average for disadvantaged students.

At the Mastery Charter High School Lenfest Campus (93% African American, 70% low-income, 16% special education), our first charter school, over 93% of Mastery's first four graduating classes ('05-'09) were admitted to an institutions of higher education. Seventy-eight percent (78%) of our students who enroll in college are at four-year institutions and they have a high persistence rate: over the past four years 77% of students have continued immediately to the sophomore year. In addition, our results are improving over time -- 85% of students who enrolled in a four year college from the class of 2008 continued on to their sophomore year. A significant challenge for our graduates is the gap between admission and enrollment: only 59% of Mastery's first four graduating classes enrolled in higher education within one year of graduating. While this is 17 percentage points higher than the average for the School District of



Philadelphia, our goal is for at least 80-% of our graduates to be enrolled in college within one year of graduation. We are making progress on this metric as well: 67% of the class of 2008 enrolled in college. We have learned that our students graduate from Mastery academically capable of competing at the postsecondary level but struggle to tackle the fiscal and cultural challenges that often get in the way of disadvantaged students' success in college. We have included funding in our budget to hire an additional college staff member at the Mastery in FY 11 to focus on revising our college readiness courses, working with schools on revising their college preparation plans, and creating alumni ambassador positions to engage graduates in getting access to resources needed to stay in, or return to, college. At our Thomas campus (72% African American, 12% Asian, 12% White, 76% low income; 16% special education), 100% of the graduates from their first graduating class (2010) since Mastery's turnaround have been accepted to a college, with 84% accepted to four-year college. Based on our understanding of the Mastery college enrollment data, our college readiness team has created a new summer initiative to make sure that graduates who have been admitted to college have their financial aid, housing, transportation, and other needs addressed prior to August enrollment. We agree with President Obama that a high school diploma is only the beginning of the educational journey and that some college is a necessary requirement to a family-sustaining career. We want Mastery students to go the whole way – college degree – and everything we do at the K-12 level must prepare them both academically and socially to be able to persist successfully to earn this key out of poverty and toward life-long success.

#### *Recruitment of and Communication with Students with Disabilities*

When Mastery takes over a new school, we seek to enroll the entire existing

student population . Mastery staff outreach to parents during the summer prior to opening via direct mail, open houses, and home visits to reach our 100% student retention goal. Our past experience is that 90% of the students who were enrolled prior to the Mastery turnaround return. Mastery schools are public charter schools open to any student, however, we function as a neighborhood school in the low-income, minority communities where we are located.

Special education parents are informed about the new school in the same way as other families, however, our special education Assistant Principal at each campus manages working with families regarding how their child's IEP will be implemented. We have between 15-22% special education populations at our current schools and have seen growth in special education families choosing Mastery schools over time, not a decline. In our three new schools scheduled for fall 2010, we are enrolling a cohort of 18 autistic children, as this school was previously a regional hub for serving autistic children and the families have chosen to remain under Mastery's management. Educationally disadvantaged students have the same opportunity to be selected for admission as do students without these disadvantages, as our admissions lottery is a need-blind process. Mastery schools consistently have waiting lists of up to 200 students at every location and filling seats has never been a challenge.

### **SECTION C: QUALITY OF THE PROJECT DESIGN**

The Mastery's expansion plan is intended to meet the Secretary's goal of increasing the number of high-quality charter schools nationwide as defined by the number of charter schools where students are meeting or exceeding the state averages in reading and mathematics. As evidenced in earlier sections of this narrative, at Mastery we have a track record of not only operating multiple charter schools, but turning around failing District-operated schools and re-

opening them as high-quality charters that meet the Secretary’s goals for closing the achievement gap. In fact, in Secretary Duncan’s address to the National Education Association on July 2, 2009, the Secretary highlighted Mastery Charter School as a “successful model” (p. 4, Duncan, 7/2/2009) for turning around failing schools. In this section we will share our **logic model** for impacting education reform through rapidly expanding high-achieving charter schools. We will then define our overarching **project goal** with the **project objectives and performance measures** that we will use to evaluate progress toward the project goal and ultimate project success. For detailed information on how we intend to implement any of the project objectives defined here, please review Part A: Quality of the Proposed Applicant.

*Value of Mastery Replication:* At present, there are very few successful turnaround charter operators in the United States and if we are able to replicate our current four charters into a group of 19 successful charters in less than five years, other School Districts and charter operators will be able to use Mastery schools as living laboratories on how to transform failing schools into successful schools where every child is prepared to succeed in college. Mastery carefully documents our student results and various systems (data, human resources, Instructional Standards, Coaching, etc.). The Mastery Network team will document our progress, failures, and mid-course corrections to achieve our project goal over the life of the grant, as well as aggregate student growth and achievement data by school. These documents will be available to the Department of Education as part of our quarterly and annual progress reports. In addition, we are eager to work with the Charter Schools Program to create on-site learning lab visits for other grantees with whom the Department thinks such a collaboration would be worthwhile.

## Exhibit C.1: Mastery Charter School Expansion Logic Model

**Inputs → Outputs → Outcomes**

OUTCOMES		
Short Term	Intermediate	Long Term
<ul style="list-style-type: none"> <li>• Dramatic PSSA gains in reading &amp; math each year</li> <li>• Improved instructional practice in classrooms</li> <li>• Standardization of coaching and observation tools (inter-rater reliability)</li> <li>• Increased family engagement in schools</li> </ul>	<ul style="list-style-type: none"> <li>• Beat District averages in Reading/Math</li> <li>• Replicate teacher and school leader professional learning and coaching programs</li> <li>• Replicate college readiness systems and supports for at-risk students</li> <li>• Evidence that student achievement and growth drives all teacher and principal daily practice</li> </ul>	<ul style="list-style-type: none"> <li>• Eliminate the Achievement Gap in all new schools by year four of operation</li> <li>• All Mastery students are college-ready. College enrollment and persistence rates surpass the national average</li> <li>• The number of Mastery schools increases and our increased market share positively influences regional education reform efforts</li> </ul>



OUTPUTS	
Activities – what we do	Participation – who we reach
Constant attention to student growth and performance data to drive instruction/learning (includes improvement of all data systems)	<ul style="list-style-type: none"> <li>• # classroom teachers, school leaders , and students accessing and using student data to drive student achievement</li> </ul>
Training sessions aligned to Instructional Standards and student outcome goals	#Teachers, Principals, All School-based Staff, & Mastery Network Support Team trained
Classroom-based instructional coaching for new and developing teachers	#New and developing teachers participating # Coaches Trained
Outreach and communication with parents	# of parents actively participating in school activities



INPUTS
*Staff *Money *Time *Parent Volunteers *Instructional Resources *Data Systems

## Mastery Charter School Expansion Project: Goal, Objectives, and Measures

**Goal:** To open 15 new, high-quality Mastery Charter Schools in five years, implementing our proven turnaround model and closing the achievement gap for the low-income, urban youth we serve within four years of opening.

**Project Objective #1:** Raise student achievement in Mastery schools to at or above the state average in reading and math within four years of operation.

**Measured by:** Standardized test scores on the Pennsylvania state assessment (PSSA) in grades 3-8 and 11 each year

### **Performance Measures:**

**PM 1a.** Each school will show achievement growth from the baseline year (2009-10) in their first year of operation greater than or equal to 25% of the achievement gap between the school's baseline scores and the state average.

**PM 1b.** Each school will show achievement growth from the baseline year (2009-10) in their second year of operation greater than or equal to 50% of the achievement gap between the school's baseline scores and the state average.

**PM 1c.** Each school will show achievement growth from the baseline year (2009-10) in their third year of operation greater than or equal to 75% of the achievement gap between the school's baseline scores and the state average.

**PM 1d.** Each school will close the achievement gap by performing at or above the state average in reading and math in their fourth year of operation.

**Project Objective #2: Increase the number of high quality charter schools in the Philadelphia Region.**

**Performance Measures**

**PM 2a:** Open three (3) new charter schools each fall between 2010 and 2014 to increase the total number of Mastery Charter Schools from 4 to 19, and the total number of students served from 2,000 to 10,000 by the end of the grant performance period.

**PM 2b:** Ensure that 100% of new Mastery Charter schools opened are making progress toward or meeting Performance Measures 1a-d. In the unanticipated event that a school does not meet the performance measures for three consecutive years; that school will be closed.

**PM 2c:** By year five of the grant 80% of students in grade 11 will be on track to be college-ready each year as measured by scoring either proficient or advanced on the PSSA or at or above the national average on the SAT.

**Project Objective #3: Ensure a High Quality Educator in Every Classroom**

**Measured by:** High quality teachers are considered those who earn Advanced or Master teacher status in Mastery's Performance Based Teacher Advancement System (PBTAS) (described in part A) or those who show positive growth by earning a promotion to the next teacher performance-level (from "Associate" to "Senior Associate" for example) each year. Forty percent (40%) of performance based pay and promotion at Mastery is based on individual teacher's student growth/academic achievement data and 40% is based on observation scores for fidelity of implementation of the Instructional Practices.

**Performance Measures:**

**PM 3a:** Percentage of teachers earning a promotion or Advanced or Master status based on student academic growth and achievement will increase by 5 percentage points each year of the grant or exceed 75% of the total teacher population each year.

**PM 3b:** Retention of high-quality teachers at Mastery (those who earn a performance-based promotion or are ranked Advanced or Master) will exceed 90% each year.

**PM 3c:** 100% of new teachers will participate in the new teacher coaching initiative, and at least 80% of first year teachers will show growth over the school year (as measured by observation scores) and meet or exceed student growth targets in their first year at Mastery.

**PM 3d:** Improve quality of professional development sessions as measured by (1) 90% teacher satisfaction in surveys post-training, (2) 80% teacher practice improvement scores on observations on trained concepts in the six-week benchmark period following each targeted professional development session.

**PM 3e:** 85% of teachers log in to the Mastery Value Added System and Benchmark Assessment database at the conclusion of each six week report period (back office verification) and show evidence of using MVAS student growth data and benchmark assessment results in modifying lesson plans to meet student need (as noted in observations and evaluations).

**Project Objective #4: Promote Parent Involvement and Satisfaction with Mastery Charter Schools.**

**PM 4a:** 80% of Mastery parents will be engaged in the school either through (1) participating in the Parent Association; (2) using Mastery's Pinnacle software program to track their student's

progress or (3) attendance at a Mastery parent-teacher conference, student exhibition, or performance.

**PM 4b:** 80% or more of Mastery parents will give the school an overall rating of “excellent” or “very good” in the annual parent survey.

**PM 4c:** 100% of Mastery schools will develop and publish a parent and community outreach plan each year and accomplish at least 75% of their stated goals each year.

### **Project Objective #5: Exceed GPRA Required Measures**

**PM 5a:** 15 new charter schools will be opened over the life of the grant

**PM 5b:** The percent of Mastery charter school students proficient on the reading and math portions of the Pennsylvania state exam (PSSA) will increase each year following the schedule outlined in Performance Measures 1a-d in this narrative to close the achievement gap within 4 years at each new school.

## **SECTION D: QUALITY OF THE MANAGEMENT PLAN**

### **Highlights of the Mastery Business Plan**

Mastery Charter School has been in operation since 2001, growing from one start-up 9-12 charter high school to four 7-12 charters by 2009-10. All four of our charter schools meet or exceed state standards in reading and math for disadvantaged students (low income, minority) and we have already been granted three new turnaround charters by the School District of Philadelphia for Fall 2010 and one for Camden, New Jersey (under the name Excellence Charter) for Fall 2011. As noted in our letters of support, the School District of Philadelphia will be converting more than 35 failing schools to charters and other models over the next five years and Mastery has been preapproved to takeover schools under this model. In fact, this year we had



four communities choose Mastery to s turnaround their schools, though we could only undertake three due to capacity constraints. We want to be able to open at least three new schools every year for the next five years. A Charter School Programs Expansion grant will be instrumental in funding the initial start-up costs associated with opening a new school and turning around a previously failing school. Once the start-up period is completed (typically the third or fourth year of operation) the schools will operate on the per-student reimbursement provided by the District and State. Our timeline for accomplishing project tasks with milestones, deadlines, and responsible parties is included as Exhibit D-1 this section on pages 36-38.

### *Ensuring Quality and Performance over Time*

The earlier sections of this narrative detailed Mastery's model and student success over time as well as the systems and infrastructure we have created to ensure high quality replication and growth. As an organization, Mastery believes that systems – programmatic, training, supervisory, back-office -- enable quality at scale. We believe in a culture of continuous improvement and have created systems such as report card data reviews, semester feedback reviews, and annual data and lesson learned processes to ensure continuous improvement is part of the regular ongoing workflow at every level. For example, we have had parts of our model that did not work as well as we would have liked. Our approach has been to review the data, develop lessons learned, research best practices and visit successful schools. We then make programmatic changes, set new goals and monitor progress. Mastery has nine core values as an organization and three of these are: “student achievement above all”, ‘straight talk”, and “continuous improvement.” As an organization we are not committed to a particular ideology and let data guide our decision making. For example, when we implemented our pay for

performance system for teachers, our data indicated that our goal setting process for teachers was often inaccurate. As a result, we invested in a Value Added data system to enable more accurate goal setting and to provide more meaningful data to teachers on their students' growth and performance. After seeing some of our early graduates struggle in college, we added "rigorous engagement" as one of the five Instructional Standards, it we learned we need to push the rigor of our instruction in order to reach our student college persistence goals.

We are continually sharpening the saw, keeping what works, and innovating to find new ways to provide an excellent education for our students.

**EXHIBIT D-1: Timelines and Milestones for the Mastery Charter Schools Program Expansion Initiative**

<b>PROJECT OBJECTIVE (summary form)</b>	<b>PERFORMANCE MEASURE ( or target)</b>	<b>Responsible Party -- <i>Project Director oversight for all initiatives</i></b>	<b>Deadline</b>
PO #1: Raise Student Achievement at new charter schools	Each new school will show growth in Reading and Math on the PSSA = to 25% of the current achievement gap at each school	Lead: Principal at each school Network Support: Deputy Chief Academic Officer	Progress updates at each of 6 annual benchmarks and 3 4Sight predictive exams b/t Sept and Feb each year July 15 <sup>th</sup> after <b>year one</b> of each new school opening (2011, 2012, 2013, 2014, 2015)
	Each new school will show growth in Reading and Math on the PSSA = to 50% of the current achievement gap at each school	Lead: Principal at each school Network Support: Deputy Chief Academic Officer	Progress updates at each of 6 annual benchmarks and 3 4Sight predictive exams b/t Sept and Feb each year July 15 <sup>th</sup> after <b>year two</b> of each new school opening (2012, 2013, 2014, 2015)
	Each new school will show growth in Reading and Math on the PSSA = to 75% of the current achievement gap at each school	Lead: Principal at each school Network Support: Deputy Chief Academic Officer	Progress updates at each of 6 annual benchmarks and 3 4Sight predictive exams b/t Sept and Feb each year July 15 <sup>th</sup> after <b>year three</b> of each new school opening (2013, 2014, 2015)
	Each new school will meet or exceed the state average in Reading and Math	Lead: Principal at each school Network Support: Deputy Chief Academic Officer	Progress updates at each of 6 annual benchmarks and 3 4Sight predictive exams b/t Sept and Feb each year July 15 <sup>th</sup> after <b>fourth year</b> of each new school opening (2014, 2015)
	Enhance professional development offerings aligned to instructional standards and MVAS student outcomes	Lead: Director of Professional Development & Coaching Network Support: Instl. Coaches	*Begins Sept of each year *August 1 each year: report on value add from PD

<b>PROJECT OBJECTIVE (summary form)</b>	<b>PERFORMANCE MEASURE ( or target)</b>	<b>Responsible Party -- <i>Project Director oversight for all initiatives</i></b>	<b>Deadline</b>
PO #2: Increase the number of high quality charter schools in the Philadelphia Region	Open three new charters each fall	Lead: CEO	*Open by Sept 1 each year
	Open first charter school in New Jersey	Lead: CEO	September 1, 2011
	Ensure 100% Mastery Charters are making progress toward closing achievement gap (Perf Measures 1a-d)	Lead: Principals Network Support: Chief Academic Officer	*PSSA final data due every August 30 <sup>th</sup> for prior year
	80% of all students in new schools on track to be college ready (profic/adv on PSSA or $\geq$ national avg on SAT)	Lead: Director of College Initiatives and CAO	*Starting in FY 13 for first three schools *Data due in August of each year
	Participate in annual Philadelphia Renaissance Schools Process to win new charters	Lead: CEO & Deputy Chief Innovation Officer	Jan-April each year
	Conduct community outreach in potential new charter communities to increase parent awareness and support	Lead: Deputy Chief Innovation Officer	Nov-April each year
PO #3: Ensure high quality educators in every classroom (HQ as defined on pp 31 of narrative)	5 % increase or 75% overall # of teachers earning promotion or adv/master status each year	Lead: Director of Human Resources School Support: Principal, AP Instruction	June 1 each year
	90% retention of HQ teachers each yr	Lead: Director of Human Resources School Support: Principal, AP Instruction	Progress checks every 2 months Final: July 1 <sup>st</sup> each year (contract renewal data)
	Increase participation in teacher coaching at all new schools	Lead: Director of PD and Coaching School level: School coach	Progress by December 1 each year End of year participation due 7/1

<b>PROJECT OBJECTIVE (summary form)</b>	<b>PERFORMANCE MEASURE ( or target)</b>	<b>Responsible Party -- <i>Project Director oversight for all initiatives</i></b>	<b>Deadline</b>
	Improve quality of PD offered throughout summer and school year	Lead: AP Instruction each school Network Support: Director of PD and Coaching	Mid-year data review: December 15 each year End of year data review: August 1 each year
	Increase teacher use of data systems	Lead: Chief Operating Officer	Data check every six weeks
	Open each new school 100% staffed in every subject/grade	Lead: Director of Recruitment Support: Principals	September 1 staffing count
PO #4: Promote Parent Involvement and Satisfaction with new Mastery schools	Create parent associations w/ elected representatives	Lead: AP School Culture	October 1, year 1
	Active parent association meetings	Lead: AP School Culture	Five meetings per year
	Increase number of parents using mastery Pinnacle system for parents	Lead: AP School Culture	Check data on use 5 times per year Annual results: July 1 each year
	10% increase in attendance at Parent-Teacher Conferences over time (use pre-Mastery baselines)	Lead: AP School Culture	Data review after each of 5 PTC periods each year Annual data due July 15 <sup>th</sup> ea yr.
	Conduct parent survey; track increase in participation in survey and school performance	Lead: AP School Culture	Survey out May 1 each year Results avail July 15 each year
	Community and parent engagement plan published and shared with parents	Lead: AP School Culture Network Support: Deputy Chief Innovation Officer	Plans released and distributed by October 1 each year
Implement Sustainability Plan for each school after grant funds end	Central finance team works with school leaders to complete start up projects on time and balance budgets in CSP funded schools after 3 years each school receives funding	Lead: Chief Operating Officer & Principals Network Support: Deputy Chief Innovation Officer	Progress reports toward sustainability due August 1 each year  100% sustainability evident by 0 school-level deficit by year 4 each school is in CSP

## Existing Organizational Capacity for Expansion

Mastery has already built the capacity to manage multiple new charters. Our capacity includes:

- Experience

Mastery currently operates four charter schools, including three school turnarounds. We are in the process of opening three additional schools for September 2010.

	<b>Lenfest Campus</b>	<b>Thomas Campus</b>	<b>Shoemaker Campus</b>	<b>Pickett Campus</b>
<b>Year Opened</b>	2001	2005	2006	2007
<b>Grades</b>	7-12	7-12	7-11	7-10
<b>Students</b>	500	575	575	475
<b>Special Ed %</b>	16%	16%	13%	22%
<b>Staff</b>	47	52	52	45
<b>Budget</b>	\$5,100,000	\$5,800,000	\$5,600,000	\$5,100,000

- Leadership

Mastery has a “bench” of school leaders who have been trained and are ready to step up to lead schools. This year we initiated an “Apprentice School Leader” program for 10 future school leaders. These talented individuals work alongside Mastery leaders, learning the job and our systems so they can be ready to assume full leadership roles in 2010-11.

- Teacher Recruitment

We hired over 65 new instructional staff members for the 2009-10 school year, and had hired more than 150 teachers for the 2010-11 year as of July 1, 2010. In anticipation of

rapid annual growth, we have added additional recruitment staff and now have three fulltime managers plus support staff dedicated to staff recruitment. Our teacher application process is completely on-line and we have scaled our data systems so we have the capacity to hire over 200 faculty and staff members each year.

- Parent Engagement

Our Parent Associations are actively involved in the governance of our schools and have helped create an effective parent outreach strategy. We have 2 part-time staff members currently working with parents in prospective charter school communities.

- Instructional Support

Mastery has developed an integrated teacher effectiveness system over the last four years. We have a full-time Deputy Chief for Professional Development and Coaching who has trained over 40 school leaders and coaches on our instructional model and academic systems. We have fully developed Instructional Standards, instructional reference guides, a complete video library of instructional and classroom management best practices, new teacher training program, an in depth professional development program, and a new teacher coach training program.

- Curriculum & Assessment

Over the last nine years, Mastery has developed robust K-12 curricula and assessments. We have a team of dedicated curriculum and instruction staff including: Directors of Special Education, Math/Science, English/History, and College Transition.

- Special Education

Mastery serves special education students at all campuses and the academic achievement of these students has skyrocketed under Mastery's management. We have a dedicated

Director of Special Education supporting all Mastery schools.

- Financial Management

Mastery has a dedicated finance team that handles finance and compliance for all Mastery Schools. We have successfully managed a combined budget of over \$22 million including over \$1,500,000 in Title I and IDEA grants. We have had no Title I audit findings to date and all of our Title I applications have been approved. In 2009-10, we implemented a scalable financial software system and have a talented and trained staff that has capacity to manage the finances of additional schools.

- Fundraising

Mastery has dedicated development staff to engage individuals and foundations interested in supporting our turnaround work.

- Operations

Mastery has successfully managed the operations of our current four schools, serving over 2,100 students and employing nearly 200 staff. We have a dedicated IT, Human Resources, and Operations staff that handle all aspects of operations at our schools including:

- Recruiting students from selected District feeder schools.
- Installing and managing technology infrastructure. We maintain a central data center that has capacity to add several additional schools and staff.
- Managing maintenance, custodial and other building operations – for nearly 300,000 sq. ft across our four campuses. At our three current Mastery turnaround schools, we take 100% responsibility for all facilities issues including HVAC, fire safety, exterior, etc.



Supervising renovations -- Mastery designed and supervised three facilities renovations for a total of over \$34 million in work. The renovations were conducted while students were in the building and at a significant discount compared to the traditional renovation process. All of our projects were completed on time and on budget.

*School Closure:* In a worst-case scenario that one of our schools does not show dramatic growth as outlined in Section C in Performance Measures 1a-d, we have a management team available at the Network level to immediately intervene if student performance targets are not met. We will withdraw our charter if we cannot make significant progress toward our academic goals within three years. We do not believe this will happen, but the Department should feel 100% confident that our belief is not in more charter schools, but in more high-achieving charter schools. Charter schools that fail children have no place in the Mastery system, nor do they deserve to exist. We must adhere to this standard for our own schools.

#### *Mastery Network Supports to New Schools*

As described earlier in this section, Mastery has invested heavily over the past three years in developing a high-functioning network support team to support student achievement at our schools, monitor and supervise our schools, and execute new school openings. Our financial model at the network level has been developed with an eye to providing necessary expertise to our schools while also growing only to a scale that is self-supporting once the network grows to full capacity (19 schools). Each Mastery school will pay an 8% management fee to Mastery Charter High School (the applicant under CSP Expansion) which will host the entire Network Support Team. In turn, the Network Support Team will provide a wide range of services, support (including teacher coaches), supervision (including Regional Directors) and back-office

functions (IT, finance, HR, compliance, fundraising, facilities, and staff recruitment) to the individual schools. We project deficits at the network level over the next several years as we grow rapidly, hitting break-even once we reach 19 schools. In short, our model is sustainable.

As noted in our Core Competencies in Exhibit A-2 on page 7, we have four sets of key systems primarily developed at the network level that will drive excellence at our schools. Organization charts for the Network Support Team, including a breakdown of the staffing structure for the Academic and Operations Teams are included as attachments to this narrative in Section 7: Other Attachments.

Human Resources and financial management capacity must expand as we grow, and our operating and financial models reflect how we grow these functions to meet the demands of adding three schools each year. Please refer to the financial plans attached in Section 6: Supplemental Budgets and Financial Information. Our Talent Development division leads and supports teacher training and coaching across the Mastery network. As the Mastery network grows, we will add coaches for new schools and tap into new resources and methods for supporting training of teachers. These are predictable expenses and have been built into the five-year financial model for Mastery included in this narrative on page 48.

### *Facilities Plan*

The facilities plan for all schools is also led by the Network Support Team. An important part of our model is having a clean, bright, safe school building. While Mastery does own one school building, our strategic plan includes leasing facilities from the School Districts where we take over failing schools. Unfortunately, often times the District facilities do not meet

Mastery's standards. Our Board strongly believes that we must commit the financial resources to renovate and improve these facilities.

The model used in our three current turnarounds and the one we are following this summer as we prepare to open three more turnaround schools includes using operating funds as well as fundraised dollars to support up to \$1 million in renovations at each facility. We are aware that no federal dollars under Charter School Expansion can be used for these purposes and we commit to that stipulation. At Mastery's three previous turnarounds, our operations team hired all contractors and managed the renovation work in a turnkey arrangement with the District and the District then leased the buildings to Mastery for a 20 year period. Under the School District of Philadelphia's Renaissance turnaround plan between now and 2014, the building that currently houses each failing school will be leased to the charter turnaround school, so our facilities model is sustainable. In Camden, the School District is committed to leasing unused District facilities to Mastery and thus our facilities model in Camden will also be sustainable. .

#### *Charter Authorization and Board Governance*

As part of the charter authorizing laws in both Pennsylvania and New Jersey, charter schools are overseen by their own independent charter school boards. The state authorizing agency (the School District of Philadelphia in Philadelphia County and the State Department of Education in New Jersey) determines charter status for each school for an initial five year period, with renewal every five years as long as the charter school is meeting the authorizing agency's performance goals (these goals are lower than Mastery's internal goals). Mastery's Board and CEO are in constant communication with both chartering authorities and has a positive and open

relationship with both. Once the charters are awarded, the Mastery Board has complete autonomy to operate each school as its own LEA.

Each school has its own Board, however. Since Mastery operates as a network of charter schools, each individual Mastery school Board has the same board members except for the elected parent representatives which differ for each school. The elected board chair directly supervises the Chief Executive Officer of Mastery Charter School and is responsible for hiring all principals at all campuses. Board members can serve for up to four two-year terms and the standing subcommittees of the Board include: Executive, Finance, Development, and Community Involvement. A list of all current board members is attached to this application in Section 4: Schools Operated by the Applicant. Our board consists primarily of business leaders, community organization leaders, educators, and parents. The Board meets at least four times per year, with the Executive Committee authorized to hold monthly meetings to discuss pressing business that must be decided prior to the next full Board meeting. Mastery has a consistent Board leadership with the average tenure of Board members over five years. The executive committee is responsible for ensuring quality board members and filling vacant seats. Nominated Board members must be approved by the full Board membership.

Mastery's Board Chair has deputized the Chief Executive Officer of Mastery to serve as her agent in matters of daily operation of the schools. Mastery Charter High School, which as mentioned earlier hosts the Network Support Team, sponsors each new charter or turnaround application. Once the new school opens it signs a management agreement with Mastery Charter High School,. This enables Mastery's network teams to provide support directly to each new school immediately upon announcement of the charter from the awarding District or chartering authority.

## *Financial Sustainability*

While our primary budget documents and budget narrative are attached in the Ed 524 and in Section 6: Supplemental Budget and Financial Documents, we have included a summary form of our five year financial plan in Exhibit D-2 shown here on page 48. As shown in D-2, the Mastery model includes some intensive, early investments in infrastructure (staff, network office time, instructional materials, training, etc.) on the front end for each new school. In addition to these costs -- which create a deficit during the first two years of operation -- Mastery spends a significant amount of operating and privately raised funds on getting the physical school buildings ready for opening. Our financial model includes a deficit in each of the first two years of school operation with schools breaking even by year three of operation. The network team continues to run a deficit as we rapidly expand network capacity through the 2013-14 fiscal year. At that point in time, number of schools fully supports the Network Support Teams costs. In fact, by 2014, the fees paid by the schools to the network actually generate a small surplus which will be used to offset start-up costs for new school openings, opening year shortfalls at schools or portions of new school renovation. ***In short, our fiscal model is sustainable on per pupil dollars after start-up costs are funded.*** Finally, we are very aware of charter school law in both states. We have been able to resolve any small issues that have arisen regarding receiving our commensurate share of Federal education funds allocated by formula in less than 45 days.

The Mastery Charter School Board has authorized our rapid expansion effort despite the risks and projected funding shortfall for several reasons:

- *Opportunity to Grow in PA/NJ is Now:* With the incentive provided by Race to the Top, both Pennsylvania and New Jersey have made great efforts to open the door to charter expansion, particularly for charters that turn around failing schools. Since Mastery is a

national leaders in this area with a positive track record, we believe we have an ideal opportunity to expand and serve more children.

- *Funding Environment is Positive for Quality Charter Growth:* Despite the national economic downturn, the Mastery Board has studied the fiscal environment and concluded that over the next three years there are funding opportunities locally, statewide, and nationally where Mastery's track record should help us be highly competitive for grant funding. The Charter School Program Expansion grant funding is a huge potential opportunity, as are possible School Improvement Grants from the state. In addition, to date we have been successful at privately fundraising and have raised over \$6 million during our first eight years of operation, with another \$7.3 million already pledged over the next three years. Two funders who have specifically pledged \$2 million to be deposited to Mastery later this summer/early fall to serve as a *grant match* if we are successful in winning a CSP Expansion grant. While we estimate we will need \$36 million more than our per pupil dollars over the next 5 years to open 15 additional schools, we are already one-third of the way there via private fundraising. Our Board is confident that between competitive grants and private fundraising, we will – and we must – find the resources to support our expansion.

Our **theory of change** is to grow school market share and engage parents to a scale large enough to be a catalyst for systemic education reform across the Districts we serve. We also believe that our success in school turnarounds and our initiatives in regards to performance-based pay, teacher coaching, leadership training, and data-driven instruction and decision making; will serve as an example and proof point for other charters and Districts undertaking reform. Finally, Charter Schools Program Expansion

funds would play a pivotal role in speeding our expansion and helping us provide high quality education to 8,527 additional students in the Philadelphia/Camden Region of the country over the next five years.

Mastery Charter School is also in excellent fiscal health: we have maintained balanced budgets during periods of growing enrollment and annual audits were issued with unqualified (clean) opinions of our financial statements. Our most recent audits are public documents are available for review.

## EXHIBIT D-2: Mastery Charter Five Year Financial Plan for Expansion

MASTERY CHARTER EXPANSION PLAN							
	Yr 1 CSP	Yr 2 CSP	Yr 3 CSP	Yr 4 CSP	Yr 5 CSP		
	FY10	FY11	FY12	FY13	FY14	FY 15	
# of new schools	-	3	3	3	3	3	540 students per new sch.
Total number of schools	4	7	10	13	16	19	
Students in existing schools	2,079	2,425	4,045	5,665	7,285	8,905	
Students in new schools	-	1,620	1,620	1,620	1,620	1,620	
Total number of students	2,079	4,045	5,665	7,285	8,905	10,525	
Revenue		41,461,250	58,066,250	74,671,250	91,276,250	107,881,250	\$ 10,250 per child
Central Office (CO) Revenue		3,316,900	4,645,300	5,973,700	7,302,100	8,630,500	8.0% Central Services fee
CO Expenses base		(5,600,000)	(5,900,000)	(6,300,000)	(6,700,000)	(7,100,000)	
		FY11	FY12	FY13	FY14	FY 15	TOTAL
CO Loss		(2,283,100)	(1,254,700)	(326,300)	602,100	1,530,500	(1,731,500)
Apprentice School Leaders		(1,300,000)	(1,300,000)	(1,300,000)	(1,300,000)		(5,200,000) 12 leaders/year
New School Start-up Costs		(3,000,000)	(3,000,000)	(3,000,000)	(3,000,000)	(3,000,000)	(15,000,000) 1,000,000 per school
New School Facilities		(3,000,000)	(3,000,000)	(3,000,000)	(3,000,000)	(3,000,000)	(15,000,000) 1,000,000 per school
TOTAL NEED		(9,583,100)	(8,554,700)	(7,626,300)	(6,697,900)	(4,469,500)	(36,931,500)
PLEDGES							
Foundation Current Pledges		500,000					
NewSchools*		1,000,000	1,000,000	400,000			*CSP match pledged
B Lenfest		1,333,000	1,333,000	1,333,000			
J. Yass*		1,000,000	1,500,000				*CSP match pledged
TOTAL FUNDS PLEDGED		3,833,000	3,833,000	1,733,000			9,399,000
Cash On Hand	3,160,780	(2,589,320)	(7,311,020)	(13,204,320)	(19,902,220)	(24,371,720)	
TOTAL NEEDED FOR FIVE YEAR EXPANSION							
**If CSP Awarded to Mastery		1,260,000	1,710,000	2,160,000	1,710,000	1,110,000	7,950,000
TOTAL NEEDED FOR FIVE YEAR EXPANSION							
(24,371,720)							
TOTAL STILL NEEDED FOR FIVE YEAR EXPANSION w/ CSP GRANT FUND AWARD							
(16,421,720)							

*Qualifications of Key Staff:*

All resumes of staff mentioned in this section have been attached to this application in Section 1: Other Attachments – Resumes.

Mastery Charter School has been led since its inception in 2001 by our **Chief Executive Officer, Scott Gordon**. Mr. Gordon is the dedicated social entrepreneur behind Mastery's success. Prior to starting Mastery, Mr. Gordon, a Yale MBA, launched a worker-owned home health care firm that won the Governor's Achievement Award for its welfare-to-work program. Mr. Gordon has led the Mastery team from opening one charter school in 2001, to the successful turnaround of three failing Philadelphia middle schools between 2005-2009, and led Mastery to winning its first three turnaround "Renaissance Schools" under the School District of Philadelphia's plan to transform more than 35 failing public schools between 2010-2014. Mr. Gordon is known as a key education leader in the Philadelphia Region and testified in 2009 for the House Education and Labor Committee on America's Competitiveness through High School Reform.

The core executive team at Mastery is also led by a **Chief Academic Officer (CAO), Jeff Pestrak and a Chief Operating Officer (COO), Joseph Ferguson**. Mr. Pestrak has been with Mastery since 2005, when he served as the founding principal of our first turnaround school. As CAO, Jeff continues to focus on designing and implementing instructional standards, curricula, benchmark assessments, school-wide performance metrics and professional development as well as administrator and teacher coaching initiatives. He is responsible for all capacity building initiatives at the network support team level to support quality instruction at all Mastery schools. Jeff began his career as a teacher in the Peace Corps – Zimbabwe, and prior to



joining Mastery he had served as a secondary science teacher, teacher coach, and curriculum writer for the School District of Philadelphia.

Joseph Ferguson serves as the Chief Operating Officer of Mastery, where he oversees all direct support functions across all schools and the network office, such as finance, facilities, information technology, and human resources. Prior to joining Mastery, Joe served as a Broad Foundation Resident in Urban Education and most recently served as the Chief of Staff to the School Reform Commission, the state-controlled governing board for the School District of Philadelphia. Joe's professional background prior to education includes more than ten years in professional consulting, most notably with Deloitte, with an expertise in cost-reduction performance reviews, organization structure design, and technology infrastructure.

The **Project Director** for the Mastery Charter School Expansion Project will be our Deputy Chief Innovation Officer, **Courtney Collins-Shapiro**. Ms. Collins-Shapiro has more than 15 years in public secondary and higher education. She has a track record of managing the implementation of more than \$75 million in competitively awarded federal grants, converting many of those grant-funded initiatives programs into ongoing District sustained programs. . Prior to coming to Mastery, she developed and ran the School District of Philadelphia's Multiple Pathways division for out-of-school youth and oversaw the creation of 14 alternative high schools serving more than 5,000 at-risk youth. Ms. Collins-Shapiro joined Mastery in May 2010 to spearhead new initiatives across Mastery schools. If Mastery is selected for a Charter Schools Program Expansion grant, her top priority in terms of time and functional responsibilities will become CSP Expansion implementation.

Two additional leadership team members will play key roles in our expansion over the next five years. Our **Deputy Chief Academic Officer, Molly Eigen**, will play a critical role in moving all new schools toward high student achievement. Molly is a Teach for America alumna, where she taught special education in the Rio Grande Valley. In 2007, Molly became the National Senior Managing Director of Programs, leading the 12 person regional team in Philadelphia and Camden. In this capacity, Molly was charged with training and supporting 300 teachers. Molly joined Mastery in 2009 and will lead all efforts to improve teacher quality in Mastery schools. If we are awarded grant funds, several new coaches and talent/professional development staff at the network office will report directly to her. **Rebecca Schatzkin** will play another key role on the Talent Development side of Mastery in the areas of teacher recruiting and principal and staff leadership development. Rebecca joined Mastery in 2009 as our **Director of Human Resources** after six years leading human resources and business development for the New Teacher Project. Rebecca will be responsible for recruitment, placement, and orientation for all new teachers and staff to be hired during Mastery's growth phase. She will also lead efforts to analyze teacher feedback to better develop our human resources and training systems, as well as to support our performance-based evaluation and compensation system for teachers and school leaders.

In addition to the key staff listed above, our five year budget projections show that we will need several additional key staff at the network support team level to directly support growth and sustainability of new, high-quality charter schools. These staff would be hired using partial-grant funds in the early stages of growth. While the people in these positions do not yet exist, the roles are critical to the success of our project and are described here:

Director of Professional Development and Coaching (Network Support Team): As part of our expansion strategy, we must invest heavily in supporting new teachers. Our hiring records for the three new schools opening in Fall 2010 show that 51% of our new teachers have two years or less experience in the classroom. All these new teachers will need intensive support learning the Mastery Instructional Standards, understanding how to use data to drive instruction, etc. At present, our Deputy Chief Academic Officer plays this role as part of her job at Mastery, however, we want to expand our professional development and coaching capacity with the volume of new teachers joining Mastery over the coming years.

Instructional Coaches (School Level): Under CSP expansion, each new school will get a full-time teacher coach for the first two years of the grant. After year two, these positions will be funded by the Network Support Team (supported by the 8% fee charged to schools). Coaches will work 1:1 with all new teachers and scaffold support based on teachers' individual instructional needs. They will also help principals and our Network Support Team design and deliver professional development sessions relevant to the needs of the teachers at their school.

Apprentice School Leaders (School Level): ASLs are a key part of our growth strategy, as we believe that high quality, well trained principals and assistant principals are critical to new schools' success. To ensure quality leadership, , Mastery developed the Apprentice School Leaders (ASL) program, where professionals are hired one full year prior to their new school opening to work full-time in a current school learning Mastery systems and preparing to run their own school and build their team. This fall we will open three new schools and 80% of our leadership teams at all three schools came from our ASL or internal leadership pool. This strategy was seed funded last year by a private donor and we believe ASL's are perhaps the most important way we can prepare for growth with quality.

### *Sustainability after the Grant*

As shown in Mastery's five-year financial model (D-2), the Mastery plan includes an upfront investment to open each new school and each school becoming fully sustainable on per pupil reimbursement dollars by the third year of operation. We have been following this model for all of our new schools over the past nine years. In addition, our Network Support Team growth plan becomes fully sustainable as the size of our charter network expands to 15 schools. We have estimated conservatively on our projections in order to account for any possible decreases in per pupil funding or emergency needs in a given year. Charter Schools Program Expansion Grant funds will allow us to create more than 8,500 new charter school seats in the Philadelphia region using a model that has been proven to deliver academic results for all students – particularly those from disadvantaged backgrounds.

### ***CSP Application Requirements***

**The CSP grant requires certain elements be met by the grantee. All required elements have been addressed as a part of the Mastery Charter School Application and a quick reference to where these items can be found is included below:**

*(a) Describe the objectives of the project for replicating or substantially expanding high-quality charter schools and the methods by which the applicant will determine its progress toward achieving those objectives.*

Found in Part C: Project Objectives and Performance Measures

*(b) Describe how the applicant currently operates or manages the charter schools for which it has presented evidence of success, and how the proposed new or expanded charter schools will be operated or managed.*

Found on pages 6-14 (Mastery Model under Part A)

*Include a description of network office functions, governance, daily operations, financial management, human resources management, and instructional management. If applying as*

*a group or consortium, describe the roles and responsibilities of each member of the group or consortium and how each member will contribute to this project.*

Found on pages 33-53 (Management Plan Part D)

- (c) Describe how the applicant will ensure that each proposed new or expanded charter school receives its commensurate share of Federal education funds that are allocated by formula each year, including during the first year of operation of the school and any year in which the school's enrollment expands significantly.*

Found on page 46 (Management Plan Part D)

- (d) Describe the educational program to be implemented in the proposed new or expanded charter schools, including how the program will enable all students (including educationally disadvantaged students) to meet challenging State student academic achievement standards, the grade levels or ages of students to be served, and the curriculum and instructional practices to be used. For purposes of this competition, the term "educationally disadvantaged students" includes, but is not necessarily limited to, economically disadvantaged children, English learners, migratory children, children with disabilities, Native American children, and neglected or delinquent children.*

Found on pages 15-26 (Parts A & B)

- (e) Describe the administrative relationship between the charter schools to be replicated or expanded by the applicant and the authorized public chartering agency.*

Found on pages 44-45 (Management Plan, Part D)

- (f) Describe how the applicant will provide for continued operation of the proposed new or expanded charter schools once the Federal grant has expired.*

Found on page 37 and throughout Part D, Management Plan

- (g) Describe how parents and other members of the community will be involved in the planning, program design, and implementation of the proposed new or expanded charter schools.*

Parents are our primary constituents and parent/community outreach is described on pages 27 & 40 of the narrative. We also employ a parent liaison at each school responsible for involving parents in the life of the grant and have included parent engagement as a performance objective in this grant.

*(h) Include a request and justification for waivers of any Federal statutory or regulatory provisions that the applicant believes are necessary for the successful operation of the proposed new or expanded charter schools and a description of any State or local rules, generally applicable to public schools, that will be waived for, or otherwise not apply to, such charter schools.*

N/A

*(i) Describe how the grant funds will be used, including how these funds will be used in conjunction with other Federal programs administered by the Secretary, and with any matching funds.*

Found in ED 524 and Budget Narrative attached to this application

*(j) Describe how students in the community, including students with disabilities, English learners and other educationally disadvantaged students, will be informed about the proposed new or expanded charter schools and given an equal opportunity to attend such schools. For a definition of educationally disadvantaged students, see paragraph (d) of these Application Requirements.*

Please see Section B.

*(k) Describe how the proposed new or expanded charter schools that are considered to be LEAs under State law, or the LEAs in which such charter schools are located, will comply with sections 613(a)(5) and 613(e)(1)(B) of the Individuals with Disabilities Education Act.*

Mastery Charter Schools are fully compliant with sections 613(1)(5) and 613(e)(1)(B) of IDEA and we receive a formula-based differential for enrolled special education students from the state. For more detail on our identification, evaluation, and compliance procedures for student services under IDEA, see our student-level response to Section 427 of GEPA attached to this narrative.

*(l) Provide information on any significant issues in the areas of student safety, financial management, and statutory or regulatory compliance. As noted in the absolute priority, for purposes of this competition, “significant” means something that did, will, or could lead to the revocation of a school’s charter.*

N/A

# Project Narrative

## Section 1 - Other Attachments: Resumes/Curriculum Vitae

Attachment 1:

Title: **MCS Expansion Resumes** Pages: **14** Uploaded File: **MCS Resume Download July 2010 DOE compat.doc**

# MASTERY CHARTER SCHOOL GRANT RESUMES

## SCOTT GORDON

7704 McCallum St.  
Philadelphia, Pa. 19118  
Cell: 267 872-8710, Work: 215 866-9000 x1056  
email: [Scott.Gordon@MasteryCharter.org](mailto:Scott.Gordon@MasteryCharter.org)

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### EXPERIENCE

#### **CEO**

##### ***Mastery Charter Schools Philadelphia, Pennsylvania***

July 2000 to Present

Organized a business-academic partnership to create charter middle and high schools for inner-city youth in Philadelphia. Beginning with Mastery Charter High School in 2001, Mastery is a non-profit charter school network that currently operates four schools in Philadelphia serving 2,100 students in grades 7-12. Three of our schools were turnarounds of low performing School District middle schools. Test scores in those schools have increased 52 points and violence decreased 85%. 100% of last year's graduating class is attending college. Mastery was named an "exemplar" charter school by the US Department of Education in 2005 - one of 15 schools selected nationwide.

In 2010, Mastery schools received three of the 22 nationwide EPIC awards for value-added student achievement. Mr. Gordon received the NewSchools Venture Fund's Entrepreneur of the Year award for his work.

#### **Consultant**

##### ***Greater Philadelphia First Philadelphia, Pennsylvania***

January 2000 - May 2000

Conducted research to determine employer demand for non-degreed technology workers. Interviewed employers, researched industry employment trends and skill standards and identified national best practices for technology worker training.

#### **President**

##### ***Home Care Associates Philadelphia, Pennsylvania***

1993-1999

**Founded worker-owned home health company** with a mission to train and employ public assistance recipients. The company is a replication of the nationally recognized Cooperative Home Care Associates of S. Bronx, NYC.

#### **Business Development:**

- Secured funding, negotiated loan agreements (\$500k), organized facility, developed MIS system, and hired staff. Obtained contracts with regional health care organizations.
- Grew business to \$2 million in revenue and 85 employees -- 90% of whom were former public assistance recipients.
- Received *Better Business Bureau's Best Health Service Award* for high quality service.

#### **Management**

- Created team-based, participatory, management system to improve work flow, encourage innovation and develop staff capabilities. Developed internal mentoring program.
- Trained employees to be worker-owners and sold shares to over 50 field employees. Worked with majority worker-owner Board of Directors.

#### **Education & Training:**

- Designed welfare-to-work job training program that trained and placed over 200 adults in health care and clerical jobs.
- Achieved 78% job placement and 70% 12 month job retention for former welfare recipients. Received *Pennsylvania Governors Achievement Award*.
- Developed innovative curriculum that uses experiential activities and group work to build work-appropriate problem solving skills and critical thinking.



- Created “Job Coaching” program to support graduates’ welfare-to-work transition by providing intensive feedback and personal counseling.
- Introduced internet accessed, self-directed, computer-based literacy module.
- Secured over \$900,000 in foundation funding and training contracts.

### ***Product Manager - New Product Development***

***General Foods Corporation, Post Cereal Division*** White Plains, New York

1988 -1992

- Developed concept and led successful launch of a new cereal called Great Grains. Supervised market research, packaging development, test market, advertising, promotions, trade sell-in and logistical support.
- Managed \$20 million budget for national introduction.
- Achieved highest share of market for a cereal introduced from 1988-92.
- Awarded "Post Quality Achievement Award".

### ***Associate Product Manager, Assistant Product Manager***

- Supervised marketing strategies for Grape-Nuts cereal. Analyzed industry trends and competitive strategies and recommended new business opportunities.

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## **RELATED ACTIVITIES**

**Founding Board Chair, Greater Philadelphia Cares** – The region’s leading volunteer community service organization. Recruited Board of Directors and hired Executive Director. Served as Board Chair. 1993-96.

**Philadelphia Private Industry Council board member.** 1998

**Yale University Elm and Ivy award** for work with local homeless project. 1988

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## **EDUCATION**

### **Yale School of Management**

***Master's of Business Administration***, 1988.

Teaching Assistant, "Designing Organizations for Self-Management".

### **State University of New York at Binghamton**

***BA, Economics***, 1984.

Academic Honors, Phi Beta Kappa. Harry S. Truman Scholar: One of fifty recipients of national award for "Outstanding potential for public service leadership".

## Jeffrey Pestrak

445 South Woodbine Avenue

Narberth, PA 19072

Mobile: 267-228-3143

Email: [jeffrey.pesttrak@masterycharter.org](mailto:jeffrey.pesttrak@masterycharter.org)

### EMPLOYMENT EXPERIENCE

*Nov 2008 - Current*

**Chief Academic Officer**, Mastery Charter Schools

- Set the vision for Mastery's educational program
- Develop and supervise lead school-based administrators
- Supervise central office teams focused on instruction, curricula, professional development and student services

*April 2005 – Nov 2008*

**Principal**, Mastery Charter School – Thomas Campus

- Oversee the daily operations of a 400 student secondary school
- Supervise administrators, teachers and support staff
- Develop and implement academic, discipline and enrichment programs

*November 2002 – April 2005*

**Academic Coach**, North Regional Office, School District of Philadelphia

- Work with teachers on an individual basis and in small groups to design and implement grade-level instructional strategies and best practices
- Develop and conduct various science education professional development workshops
- Ensure that the educational needs of all students are met, including those with diverse learning needs

*September 2002 – May 2005*

**Adjunct Instructor**, Temple University, Department of Curriculum, Instruction and Technology in Education

- Teach "Teaching Science N-6" to undergraduate juniors and seniors majoring in elementary education

*May 2004 – May 2005*

**Adjunct Instructor**, Community College of Philadelphia, Chemistry Department

- Teach General Chemistry 101 to undergraduates

*June 1999 – June 2004*

**Science Teacher/Curriculum Developer**, Community College of Philadelphia

- Design and implement inquiry-based science curricula to Philadelphia high school students in the following programs: Upward Bound, Gear-Up, and Health Careers Opportunity Program

*December 2001- November 2002*

**Coordinator**, Philadelphia Futures: Sponsor-A-Scholar Program

- Facilitated parent-mentor-student relationships of approximately 50 high school students
- Developed, planned and implemented activities that encourage a successful high school experience and a positive transition into college
- Tracked students' school and extracurricular performance

*May 2001 – December 2001*

**Education Specialist- Sub-Saharan Africa Region**, Nonprofit International Consulting Firm

- Conducted assessments of government, UN and NGO HIV/AIDS education and communication organizations and programs in Sub-Saharan Africa
- Developed education and communication project proposals and recommendations for the HIV/AIDS development community
- Identified methods to assess impact of intervention programs on epidemic

*Sept. 1997 – June 2001*

**High School Biology Teacher**, William Penn High School, School District of Philadelphia

- Taught tenth grade Biology and twelfth grade Advanced Biology

- Designed and utilized activity and lab based Biology and Advanced Biology curriculum
- Attended all progress meetings with parents and maintained positive and informative relationships by routine mailings, on-line grading and phone conferences
- Established and facilitated robotics club that competed locally and nationally
- Organized several fundraising endeavors
- Served as Junior Class Sponsor

*Jan. 1999 – Aug 2000*

**Night School Substitute Science Teacher**, Franklin High School, School District of Philadelphia

- Taught Environmental Science, Biology and General Math to high school students and adults.

*Jan. 1999 – June 1999*

**Science Teacher**, The Bridge (residential rehabilitation center)

- Designed and implemented general science curriculum to detained adolescents with drug addictions

*June 1998– Aug 1998*

**Math Teacher**, Korean Catholic Community Church Summer Education Program

- Designed and taught activity based math program to 3<sup>rd</sup> and 4<sup>th</sup> grade Korean immigrants with a wide range of English language skills

*June 1997 – Aug. 1997*

**Science Coordinator**, Sat-Turn Summer Day Camp

- Developed and taught a physics curriculum that emphasized the mechanics of amusement rides to 6<sup>th</sup>, 7<sup>th</sup> and 8<sup>th</sup> graders

*Oct. 1994 – Dec. 1996*

**U.S. Peace Corps Volunteer**, U.S. Peace Corps/Zimbabwe

- Taught general science to 8<sup>th</sup> through 11<sup>th</sup> grade rural Zimbabweans
- Appointed as Head of Science Department
- Designed school science syllabus
- Trained and supervised the performance of other teachers in the science department
- Initiated and organized World Map Mural Club
- Coordinated the first local science fair
- Established and coached the first baseball team in the province
- Wrote grants and received funding from USAID and the Peace Corps Small Project Assistance Program to establish the Fast Winds Windmill Manufacturing Cooperative and install a running water system in a rural village
- Wrote grants, received funding and assisted in establishing several rural based cooperatives including a dress making business, women's uniform producing business, family poultry farm and community based cross-cultural service in which tourists pay a fee to experience rural Shona life

## EDUCATION

**Jan. 1997 – May 1999**

*Temple University- Philadelphia Pennsylvania*

*Master of Education, Secondary Science Education, GPA 3.94*

**Aug. 1990 – June 1994**

*Bloomsburg University- Bloomsburg Pennsylvania*

*Bachelor of Science, Biology, Cum Laude, GPA 3.53*

# JOSEPH FERGUSON III

2611 Equestrian Way, East Norriton, Pennsylvania 19403

Email: [jfergusoniii@hotmail.com](mailto:jfergusoniii@hotmail.com)

Phone: 610-539-6491

## SUMMARY OF QUALIFICATIONS

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Operations manager with strong project management skills. Strong background in organizational and process re-design, cost-reduction, and technology strategy. Expanding knowledge of school reform practices, education policy and governance models. Excellent communications and leadership skills.

## PROFESSIONAL EXPERIENCE

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### **Mastery Charter Schools, Philadelphia, PA (2009-Present)**

*Chief Operating Officer*

Manage support operations for a \$30 million, 250-person organization. Functional areas of responsibility include Facilities, Finance, Human Resources, and School Operations, and Technology.

#### **Notable Accomplishments:**

- Completed two multi-million dollar school renovation projects on-time and under budget at Lenfest and Pickett campuses.
- Began development and implementation of a performance management system for 12-month employees (School leadership and central office staff) which will include job-specific training, performance-based pay, and leadership development.
- Supervised the development of a centrally operated data center for our campuses. Preliminary estimates reveal a 25% reduction in maintenance-related costs per campus as a result of this initiative.

### **The School District of Philadelphia, Philadelphia, PA (2004-2008)**

*Chief of Staff, School Reform Commission*

*Executive Director, Chief Operating Office*

Selected to serve as senior executive for state/city appointed governing body, the School Reform Commission. Manage day-to-day operations of \$18 million, 60-person organization consisting of General Counsel, Internal Audit, Inspector General, and Strategic Development offices. Work closely with District leadership, community and parent organizations, and communications/media relations.

#### **Notable Accomplishments:**

- Project managed the 2007-08 CEO Search process which resulted in the March 2008 appointment of Dr. Arlene Ackerman. Search process included coordinating search firm efforts, organizing 11 community meetings, and convening a 30-person Search Advisory Committee.
- Managed the selection process for a Harrisburg-based government relations firm for the School District. Activities included drafting the Request for Proposals, coordinating Commissioner-firm interviews and negotiating contract terms for selected firm.
- Served as co-chair for the Financial Accountability Unit – a cross-SRC/District steering committee responsible for implementing budgetary and expenditure-related controls, improving management reporting, and identifying financial policies for Commission adoption. As a result of these actions and other expense reduction decisions, a \$181 million District-wide Budget Deficit was reduced by 40% over the fiscal years 06-08.
- Worked with COO Leadership team to identify \$20 Million in operating savings in response to Budget Deficit. Savings initiatives included energy programs, Reduction in Force (RIF), contract elimination, and tighter controls on travel and overtime expenditures.
- Served as logistics lead for execution of two Reductions in Force (RIF) of 180 and 170 central office positions in December 2006 and June 2007, respectively. Led internal coordination meetings with Finance, Technology, Security, Behavioral Health, and Human Resources.
- Worked with outside counsel to facilitate non-renewal hearings for two low-performing charter schools. These hearings were the first of their type since the Commission's inception.

## *Manager, Program Analysis and Support*

Selected as 1 of 16 from over 300 candidates to participate in The Broad Foundation's Residency in Urban Education, an intensive two-year management development program designed to recruit and prepare high-potential individuals from outside the education sector for senior leadership roles in public education.

### **Notable Accomplishments:**

- Served as lead facilitator for cross-functional District team responsible for the consolidation of over 1400 District central office staff from 4 separate locations into the new Education Center. Team activities include building construction, move planning, building management and operating procedures development.
- Performed financial and management process review of Facilities Maintenance area to investigate and eliminate recurrence of cost-overruns. Implemented an off-line invoice repository for financial commitments and used trade-specific encumbrances based on historical data. Long-term recommendations included creation of Region-based budgets and a Preventive Maintenance Program. One-year reduction in cost-overruns is estimated to be over 80%.

## **Deloitte Consulting, New York, NY (1997- 2004)**

*Promoted to Senior Manager, 2004*

*Manager and Senior Consultant, 1999-2004*

### **Notable Project Accomplishments:**

- Cost Reduction Performance Review: Led review of \$84 Million Cost Savings program. Managed cross-functional team aimed at designing and performing testing procedures, quantifying savings offsets, and recommending process improvements for future savings program tracking and expense reporting. Analysis resulted in net adjustment -8% of sample tested.
- Product Strategy for Internal Infrastructure Technology Organization: Communicated product information to potential customers by developing service catalogs and coordinating product manager efforts. Designed and implemented annual demand planning and technology investment processes.
- Organization Structure Design: Evaluated and recommended options for incorporating business and program management organization into the current product management structure. Developed operating model materials and business case.
- Latin American E-banking / Brokerage: Developed a greenfield multi-channel retail bank/brokerage targeting affluent Latin Americans for a leading global bank, positioned across North and South Americas.
  - Created Request for Information (RFI) on financial systems and designed preliminary set of process models for client's "dream state" banking solution.
  - Led vendor evaluation, selection process, and client negotiations around financial systems, investment tools and market data.
  - Facilitated workshops to drive business and operational requirements around a proprietary online investment advice service offering, which resulted in a provisional patent.

## **American Management Systems (1995-1997)**

*Public Sector Senior Analyst*

### **Notable Project Accomplishments:**

- Directed transformation of personnel, budget and performance measurement information into data warehouse for federal civilian agency which provided users with immediate, on-line access to the most current cost data available.
- Designed and implemented time management system which resulted in improved ability of managers to track labor hours to activity-project combinations for cost management purposes.

M.B.A., Marketing and Finance, New York University – Stern School of Business, 1999

B.S.Econ, Strategic Management, University of Pennsylvania – Wharton School, 1995

B.A.S., Systems Engineering, University of Pennsylvania, 1995

#### AFFILIATIONS

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Philadelphia Futures, Mentor

Association of Hispanic and Black Business Students (NYU), Past President

Society of Black Engineers (UPENN Chapter), Past President

**COURTNEY COLLINS-SHAPIRO**  
**(\*\*PROPOSED GRANT PROJECT DIRECTOR)**

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**PROFESSIONAL EXPERIENCE**

**MASTERY CHARTER SCHOOL NETWORK, Philadelphia, PA** 5/2010 – present

***Deputy Chief Innovation Officer***

- Responsible for leading new projects, incubating new ideas, and finding resources to support Mastery expansion
- Oversee Mastery's relationship with all federal, state, and private funders, including accountability of Mastery staff and schools to funded outcomes
- Manage internal and external communications plan

**SCHOOL DISTRICT OF PHILADELPHIA, Philadelphia, PA** 8/2003 – 5/2010

**OFFICE OF MULTIPLE PATHWAYS TO GRADUATION**

3/2006 – 5/2010

***Founding Director***

- Created and led new office which created the 2<sup>nd</sup> largest and most successful set of alternative schools for at-risk youth in the nation in less than three years
- Directed growth of program from \$8m to \$50m in annual operating and grant funds serving more than 20,000 students in grades 7-12
- Oversee contracting, accountability, RFP processes, and creation of new schools in the District's "Multiple Pathways" portfolio serving 5,000 at-risk youth in full-time academic programs, including sixteen (16) accelerated high schools, eight (8) night schools, Gateway to College, the Literacy Bridge, and an Occupational Skills programs
- Supervise 12 professional staff and manage contracts for more than 200 school-based positions
- Serve as the District's representative for the citywide Project U Turn Collaborative to identify key policy initiatives, seek legislative action on issues related to at-risk youth, and target funding opportunities for strategic investment between city, state, District, and private investors
- Design and implement the Student Success Center and Reengagement Center initiatives serving more than 14,000 youth annually
- Build relationships with internal (school faculty, administrators, union representatives, student organizations) and external (community based organizations, education groups, funders) constituents to leverage resources and braid funding streams to meet program goals
- Focus on use of student data to design and strengthen programs for at-risk youth
- Serve as District spokesperson on issues of struggling students, dropout prevention, and alternative education

**OFFICE OF COLLEGE AND CAREER AWARENESS**

8/2003 – 3/2006

***Assistant Director***

- Led creation of new Office of College and Career Awareness (opened September 2003) to design and implement district-wide programs and supports to increase postsecondary enrollment for 91,000 primarily low-income, minority, middle and high school public school students
- Supervised 12 professional staff and 10 graduate fellows
- Served as budget officer for new office and created program plans and accountability systems for annual allocation of \$15 million in operating and grant funds
- Designed new standards-based guidance curriculum for college guidance counselors
- Project direction for two GEAR UP grants serving 24,500 students citywide
- Served as liaison on college preparation issues with other School District departments, individual school staff and students, community partners, and institutions of higher education

**UNIVERSITY OF MARYLAND, College Park, MD**

8/1997 – 8/2002

**OFFICE OF CAMPUS PROGRAMS**

***Program Coordinator***

7/1999 – 8/2002

- Senior Student Affairs division team member coordinating programming efforts between Campus Programs and other areas of the campus, included chairing committees for Family Weekend, Undergraduate Women's Leadership, University Relations (Development), and the Diversity Initiative
- Advised 14 women's and 10 historically-black Greek-letter organizations
- Hired, trained and supervised two professional staff members
- Coordinated grant funding and student selection for leadership institute scholarship and ambassador program

## **COURTNEY COLLINS-SHAPIRO**

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### **PROFESSIONAL EXPERIENCE (continued)**

- Served as a member of the Vision Committee: a think tank and long-term strategic planning body
- 2001-2002 Finalist for "Outstanding Advisor to a Student Organization"—Division of Student Affairs

#### ***Adjunct Faculty, College of Education***

8/1997 – 8/2002

- Design curriculum for and teach two Leadership Theory and Practice courses for undergraduates each semester in the College of Education
- Supervise and train up to eight undergraduate student interns and teaching assistants each semester

#### ***Housing Coordinator/Panhellenic Advisor***

8/1997- 8/1999

- Hired, trained and supervised live-in House Directors for the 22 University-owned and 14 privately-owned residential facilities at Maryland
- Administered annual Housing Satisfaction Assessment and Data Collection for continued assessment of the living-learning environment in university owned housing
- Advise Maryland's award-winning Panhellenic Association consisting of 14 NPC sororities and 1 Latina sorority, involving over 1300 undergraduate women

#### **UNIVERSITY OF PENNSYLVANIA, Philadelphia, PA**

8/1996 – 7/1997

#### ***Graduate Assistant, Office of the Vice Provost for University Life***

#### **US HEALTHCARE, Blue Bell, PA**

8/1994 – 10/1996

#### ***Sales and Marketing Representative***

#### **DELTA DELTA DELTA FRATERNITY, Arlington, TX**

6/1993 – 7/1994

#### ***Field Consultant***

### **EDUCATION**

#### **University of Maryland, College Park, MD**

Doctor of Philosophy, Education Policy and Leadership

*Coursework completed, Anticipated degree completion: December 2011*

#### **University of Pennsylvania, Philadelphia, PA**

Master of Science in Higher Education Administration, June 1997

#### **Villanova University, Villanova, PA**

Bachelor of Arts, English, May 1993, *Cum Laude*



# Molly K. Eigen

829 N. Taylor St. \* Philadelphia, PA \* 19130 \* (215) 528-7995\*  
molly.eigen@masterycharter.org

## Relevant Experience

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Mastery Charter Schools, **Philadelphia, Pennsylvania**

May '10 – Present

DEPUTY CHIEF ACADEMIC OFFICER

*Manage the academic design team ensuring that Mastery wide curricular and assessment resources are rigorous, effective, and implemented appropriately across seven schools. Manage three full time teacher coaches to ensure that all teachers are meeting high performance standards and attaining breakthrough student achievement results. Determine network wide teacher expectations and instructional supports.*

Mastery Charter Schools, **Philadelphia, Pennsylvania**

May '09 – May '10

DIRECTOR OF TEACHER COACHING AND PROFESSIONAL DEVELOPMENT

*Designed and implemented a coaching and professional development program across four campuses including a robust multi day training, ongoing coach management and support, and accountability to concrete campus coaching goals. Trained administrators and teachers on school wide data analysis and conferencing. Designed explanation documents and accompanying trainings for a variety of instructional strategies utilized across 130 teachers. Managed the curricular design team.*

### Results and Initiatives:

- Significantly increased the number of teachers coached across the organization.
- Over 80% of coached teachers reported that coaching made them a better teacher.
- Provided programming that measurably increased teachers' abilities to execute lessons with a focus on rigorous engagement.
- Designed a data analysis protocol that increased teachers' abilities to deeply analyze data and make informed instructional choices.

Teach For America, **Philadelphia, Pennsylvania**

July '07 – May '09

NATIONAL SENIOR MANAGING DIRECTOR OF PROGRAM

*Set strategy for teacher support and development to be executed in 29 urban and rural regions and with over 6,000 teachers. Create strategic vision for Philadelphia-Camden regional teacher training and supervision; oversee 300+ teachers in 100+ schools in Camden and Philadelphia working toward significant measurable academic achievement; hire, train and manage full time staff of 12; design multi week, content specific teacher training programming; create data based performance management system for teacher coaches; manage relationships with diverse constituencies including School District of Philadelphia, University of Pennsylvania, and charter school partners; serve on senior leadership team charged with decision making and strategy development in all aspects of our presence in the region.*

### Results and Initiatives:

- Constructed and managed systems to address large scale programmatic growth in staff and teachers
- Managed implementation of new, more rigorous measure for student achievement results, resulting in an increase from 49% to 76% of corps members producing rigorous and reliable student achievement data
- Managed Camden and Philadelphia programmatic merger to integrate university partnerships, new district and additional state requirements
- Designed innovative pre-service corps member training leading to corps member investment and implementation of a data driven approach to instruction

#### MANAGING DIRECTOR OF PROGRAM

Designed a region-wide programmatic revamp with new strategies and structures to address corps culture and satisfaction, corps member efficacy, teacher retention and teacher hiring and placement. Managed a six person team to design and implement teacher professional development structures for a corps of 200+ teachers in 80+ schools in Philadelphia. Worked closely with Teach For America national Teacher Support and Development Team to provide feedback on design and strategy initiatives nationwide.

##### **Results and Initiatives:**

- Increased Philadelphia corps member retention from 77% to 89%
- Led a shift in corps member culture that resulted in growth from 20<sup>th</sup> ranked region to 5<sup>th</sup> ranked region in regional corps member satisfaction, surpassing our 75% satisfaction goal
- Created annual Mid Atlantic Summit teacher training conference for over 300 teachers from four regions

#### PROGRAM DIRECTOR

Supervised and supported 50 first and second year teachers annually to ensure student achievement of dramatic and measurable gains. Developed and implemented strategic large scale programmatic structures including learning teams, certification and university partnerships, summer programming, inter regional conference, principal relationships and resource collection and creation.

##### **Results and Initiatives:**

- Structured and executed regional corps member programming that led to highest corps member satisfaction in the country (25% increase over two years)
- Maintained over 97% teacher retention annually, significantly above national average
- Designed and executed highest rated content specific teacher training in the country
- Advised the national Teach For America teacher training design team on special education teacher training as a member of the Cross Regional Special Education Task Force
- Served as a Corps Member Advisor to train a group of 17-20 teachers during the intensive summer Teach For America teacher training Institute (2002, 2003)

#### ***SPECIAL EDUCATION MATH AND SCIENCE TEACHER (Teach For America Corps Member)***

Instructed 80+ students daily in Title I under-resourced high school; created and implemented differentiated curriculum for Biology, Physical Science and Health. Monitored 35-45 students' IEPs annually, completing required paperwork and collaborating closely with general education teachers. Selected by administration to chair school wide professional development committee and represent special education on the school site based decision making committee.

##### **Additional Responsibilities:**

- **Founded and ran Freshman Initiative**, a math/science school wide remediation program designed to support the 100 lowest performing freshman in the school. Managed a \$30,000 grant and three staff members. Created an ongoing assessment and tracking system to monitor student academic growth and engagement.
- **Founded and ran T.E.A.C.H. (Teens Excelling At Challenging Heights)**, an after school tutoring and community service program designed to engage and support at risk students and students with special needs. Projects included school mural project, school bench mosaic project, community clean ups, neighborhood house painting and a week long community service learning project in Atlanta, Georgia.
- **Supervised the Special Education Department** as Department Head. Created schedules and rosters for 300 students, eight teachers, and six paraprofessionals in the special education department. Designed and managed department wide discipline and incentive systems. Overhauled annual special education assessment system, coordinating state and alternative testing to meet special education requirements.

**Selected Recognitions:**

- Recipient Region One Service Learning Grant (2001, 2002)
- Recipient McAllen Junior League Creative Teacher Grant (2001, 2002)
- Finalist, Teacher of the Year (2002)

*Teach For America \* Rio Grande Valley, **McAllen, Texas***

CORPS LEADER

*August '00 - July*

*'03*

Led first and second year teacher monthly professional development as a **Learning Team Leader**. Worked closely with regional staff to organize corps events and communication as a **Corps Member Intern**. Designed and executed annual corps member induction programming to orient new teachers to the community and resources of the Rio Grande Valley as two time **Induction Coordinator**. Intensely supported two groups of first year teachers during the Teach For America summer training institute as a **Corps Member Advisor**.

## **Education**

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**Northern Arizona University Graduate School**, Flagstaff, AZ

Master's of Education in Educational Leadership (K-12 Focus), December, 2007

**University of Texas, Pan American**, Edinburg, TX

Special education teacher certification coursework, 2000 - 2001

**University of Michigan**, Ann Arbor, MI

B.S., Resource Ecology and Management, 1999

**Rebecca Schatzkin**

317 S. 17<sup>th</sup> Street, Apt. 6 . Philadelphia, PA 19103 . 215-906-2007 . [rschatzkin@gmail.com](mailto:rschatzkin@gmail.com)

**EMPLOYMENT**

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**Mastery Charter Schools Feb 2009-Present*****Human Resources Specialist***

- Developing a high-performing Human Resources department, including operating processes, policies and procedures
- § Designing and implementing an organization-wide performance management system
- § Developing management practices that support a positive working culture
- § Analyzing compensation and employee advancement systems, and implementing changes to existing structures
- § Coordinating employee benefits, including negotiating competitive benefits and managing outside contractors
- § Ensuring organization-wide compliance for state certification and Highly Qualified Teacher regulations

**The New Teacher Project July 2003-Jan 2009*****Human Resources Manager and Business Analyst Sept 2007-Jan 2009***

- Consulted on projects for the human resources team including talent recruitment, staffing, and benefits administration. Analyzed existing technology products and generated creative solutions for making systems more effective and efficient.
- § Worked with various managers across the organization to project and prepare for upcoming vacancies
- § Tracked and analyzed recruitment data to ensure TNTP utilizes the best strategies to meet goals
- § Researched and implemented new recruitment strategies to build a diverse, talented pool of applicants
- § Maintained and administered a wide range of benefits for the entire organization
- § Developed business process models, user requirements, scope and objectives, and workflow diagrams to convey issues and solutions to clients and developers

***Director of Placement, NYC Teaching Fellows Sept 2005-Sept 2007***

- Directed yearly placement process for 1,700 new Fellows, in partnership with the NYC Department of Education
- § Developed systems to match schools with teachers, ensuring a more effective, efficient, and timely hiring process
- § Created a comprehensive principal communication plan and produced extensive resources for Fellows, providing a high level of customer service for schools and incoming teachers
- § Analyzed district hiring data and implemented changes to placement process based on findings
- § Supervised planning and execution of hiring fairs for hundreds of Fellows and principals
- § Managed two full-time staff members and one seasonal staff member to successful results

***Recruiter, NYC Teaching Fellows Oct 2004-Sept 2005******Operations Associate, NY Urban Teachers July 2003-Oct 2004***

- Worked with the New York City Department of Education to recruit 15,000 candidates to the NYC Teaching Fellows program through the design of a \$400,000 marketing campaign. Defined operations processes for NY Urban Teachers, a certified teacher recruitment initiative.
- § Established and implemented plans for developing internet recruitment, finding qualified math and science teachers, and recruiting college students
- § Created ad slogans for a subway campaign, designed posters, and drafted and edited written communications
- § Assisted in design and management of an applicant tracking system for candidates
- § Designed query system in Microsoft Access to gather applicant data from applicant tracking system
- § Supervised two interns engaged in data entry, admissions processing, and daily candidate communications

**EDUCATION**

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**Columbia University:** Bachelor of Arts, May 2003; Psychology and American Studies Concentrations

**Extracurricular Activities**

- § Field Hockey, Intercollegiate varsity team member (1999-2002); Captain 2002
- § Everybody Wins!, Elementary school reading program at P.S.125, tutor (2001-2003)

**VOLUNTEER EXPERIENCE**

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**Big Brothers Big Sisters, Teen Mothers Program, Big Sister/Mentor Feb 2006-April 2007**

**Make-A-Wish Foundation, Wish Granter May 2005-Sept 2006**

**ADDITIONAL SKILLS**

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- § Extensive experience with Microsoft Access, Excel, PowerPoint, FrontPage, and Word

**Judith E. Tschirgi, Ph.D. (Chair, Board of Trustees, Mastery Charter School)**

Judy consults with a variety of for-profit and non-profit organizations to help them improve their use of information for decision making, technology and development processes and their sourcing strategies. She

has a long-standing interest in helping individuals operate better within their organization to improve their own decision making consistent with the organization's goals and business culture. Some of her consulting is done with her husband, Stephen J. Hoch, the Patty and Jay H. Baker Professor of Marketing Professor at the Wharton School. Judy is also a Principal Consultant at Workplace Relationships providing executive coaching and development services.

From 2002 to 2008 Judy served as Chief Information Officer at SEI and a member of SEI's executive committee. She was responsible for SEI's corporate technology strategy and supported the development, maintenance and servicing of the technology platforms enabling SEI's business solutions for both institutional and private banking clients. From 1995 to 2001 she was with SEI's Investment Services and Systems (IS&S) product group responsible for the development and product life cycle management of SEI's Open Architecture technology, middleware products, and workstation/web technology. Judy was primarily responsible for SEI's technology offshore outsourcing strategy and implementation which began in 1995. Prior to joining SEI Judy held a number of positions at AT&T Bell Laboratories (now Alcatel) where she was responsible for new product development and R&D in various speech technologies. While at AT&T she received both the Arno Penzias award for successful technology transfer and the AT&T Architecture award for new product development.

Judy received her BA from Stanford University in 1975 and received her Ph.D. from the University of California, San Diego, in 1979, both in Experimental Psychology. She currently serves as Chair of the Board of Trustees of the Mastery Charter School System in Philadelphia, and serves as Secretary on the Board of Directors of the Peoples Emergency Center in Philadelphia. She is also a Senior Executive Fellow of the Economy League of Greater Philadelphia, serving in a pro bono capacity conducting policy and advisory services, after having served on its Board for four years.

Judy and her husband, Stephen Hoch, reside in Philadelphia. They have two daughters.

# Project Narrative

## Section 2 - Other Attachments: Letters of Support

Attachment 1:

Title: **Mastery Charter Network Letters of Support and Match Pages: 19** Uploaded File: **Section 2 final LOS Match Upload.pdf**

## SECTION 2: LETTERS OF SUPPORT AND MATCH

1. School District of Philadelphia – letter of support and verification of Mastery Role in LEA’s school turnaround plan pp. 2-3
2. State of New Jersey – letter of support p. 4
3. New Schools Venture Fund – letter of support p. 5
4. City of Philadelphia – letter of support p. 6
5. School Advisory Council Recommendations of Mastery for new Charters opening Fall 2010
  - a) Community Support – Harrity Elementary pp. 7-9
  - b) Community Support – Mann Elementary pp. 10-12
  - c) Community Support – Smedley Elementary pp. 13-17
6. \$1M Match Letter – Jeff Yass p. 18
7. \$1M Match Letter – New Schools Venture Fund p. 19



**The School District of Philadelphia  
Office of Charter, Partnership and New Schools  
440 North Broad Street, 3<sup>rd</sup> Floor  
Philadelphia, PA 19130**

***Benjamin W. Rayer***  
***Chief Charter, Partnership & New Schools Officer***

***Tel: 215-400-4090***  
***Fax: 215-400-4091***

June 23, 2010

The Honorable Arne Duncan  
Secretary of Education  
U.S. Department of Education  
400 Maryland Avenue, SW  
Washington, DC 20202

Dear Secretary Duncan,

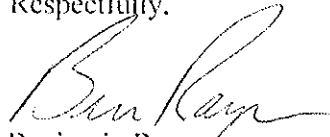
In the spring of 2009, the School District of Philadelphia adopted a Strategic Plan entitled *Imagine 2014*. One of *Imagine 2014*'s five priority goals is "Quality Choices" -- to build a "system of schools where success is rewarded and failure not tolerated." To that end we have created "Renaissance Schools," to turn around our lowest performing schools and bring transformative improvement in student achievement.

Our plan calls for the transformation of up to 35 Renaissance Schools by 2014 by matching those schools with District turnaround teams, including charters, who can lead the school turnaround process. In May 2010, three local School Advisory Councils made up of parents and community members selected Mastery Charter School as their top choice to turnaround their failing local elementary schools -- Mann, Harritty, and Smedley -- this fall, and our School Reform Commission has voted to reopen these schools as Mastery turnarounds in September. Each spring for the next four years, we intend to run a similar competition opening between 8-15 failing schools to charters and other school operators with a proven track record of closing the achievement gap for disadvantaged students.



In order to successfully fulfill our goal of transforming our lowest performing schools, we are in need of high quality providers who are capable and ready in the area of school turnaround. In that spirit, I support the Charter Schools Program Expansion Grant to expand the capacity of Mastery Charter Schools to open and operate more successful charter schools in Philadelphia.

Respectfully,

A handwritten signature in cursive script, appearing to read "Ben Rayer".

Benjamin Rayer  
Chief Charter, Partnership, and New Schools Officer  
The School District of Philadelphia



State of New Jersey  
DEPARTMENT OF EDUCATION  
PO Box 500  
TRENTON, NJ 08625-0500

CHRIS CHRISTIE  
*Governor*

KIM GUADAGNO  
*Lt. Governor*

BRET SCHUNDLER  
*Commissioner*

June 26, 2010

The Honorable Arne Duncan, Secretary of Education  
U.S. Department of Education  
400 Maryland Avenue, SW  
Washington, D.C. 20202

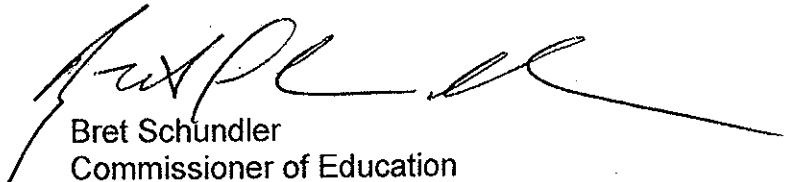
Dear Secretary Duncan,

Turning around our lowest performing schools is of the highest priority for the State of New Jersey. We have already identified our Tier I and Tier II schools and have created a competitive process to provide grants to support transformative changes at these schools. We are moving quickly to implement the four turnaround models described by the US Department of Education.

We realize that the success of our efforts will depend on both building districts' internal capacity and identifying high-quality school management organizations that can partner with districts to take on the management of low performing schools. Unfortunately, there are very few organizations that have the track record and proven capacity to do turnaround work.

I have meet with leaders from Mastery Charter Schools and am aware that they have been highlighted by the Department as a model for school turnarounds. We are excited about the possibility of working with Mastery and strongly support their CSP Expansion proposal to expand their capacity and replicate their turnaround model.

Sincerely,



Bret Schundler  
Commissioner of Education



June 25, 2010

The Honorable Arne Duncan  
Secretary of Education  
U.S. Department of Education  
400 Maryland Avenue, SW  
Washington, DC 20202

Dear Secretary Duncan,

NewSchools Venture Fund is a venture philanthropy organization working to transform public education by investing in educational entrepreneurs and connecting their work to systems change. Since our founding, we have made portfolio-level investments in 35 organizations, including nonprofit charter management organizations (CMOs), school support organizations, accountability and performance tools, and human capital providers. Mastery Charter School is one of the organizations where we have both invested and seen remarkable results.

Of the few organizations with any school turnaround track record, only Mastery has a proven management and instructional model that has closed the achievement gap for high-need students across multiple schools that were previously failing and has sustained such gains over time. While Mastery is poised to double in size in 2010-11, their strategic plan also calls for adding approximately 6,500 additional students over the next five years, building their capacity in the Philadelphia region and making them a prime candidate for transferring learning to other charter operators nationally who are interested in building capacity to do turnaround work in other cities. Mastery continues to not only invest in their people through high quality professional development and coaching, but in quality data systems so that every decision at the school or classroom level is informed by individual student-level data in the pursuit of academic excellence for every child.

We believe Mastery has both the model and the capacity as an organization to grow at the pace proposed in their Charter Schools Program Expansion Grant application with both the high quality they have delivered in the past and with unwavering adult attention to student achievement. We strongly support their application for the 2010 CSP competition and believe they are more than capable of meeting the Department's stated performance measures to both increase the number of charter schools nationwide and increasing the percentage of charter students who meet or exceed State examination proficiency levels in reading and math.

Sincerely,

A handwritten signature in black ink, appearing to read "Jordan Meranus".

Jordan Meranus  
Partner, NewSchools Venture Fund



# CITY OF PHILADELPHIA

OFFICE OF THE MAYOR

June 24, 2010

The Honorable Arne Duncan  
Secretary of Education  
U.S. Department of Education  
400 Maryland Avenue, SW  
Washington, DC 20202

Dear Secretary Duncan:

Since Mayor Michael Nutter's inauguration in January 2008, public education has been a priority of this administration. Specifically, two of his three administration goals are to cut the dropout rate in half and double the college attainment rate for residents of our city. To do this, we must address the glaring achievement gaps in our city that persist along socioeconomic and racial lines.

Under Superintendent Arlene Ackerman's leadership, Philadelphia Public Schools are now on the right track to improving academic outcomes for thousands of children by aggressively reclaiming failing schools and implementing a five-year program to turnaround these schools called the "Renaissance Schools" program. Under this program, education organizations with a proven track records of success – including charter schools – can apply to takeover failing District schools. Between 2010 and 2014, the District intends to "turnaround" up to 50 failing schools – with half of those likely being granted to charter school organizations like Mastery Charter Schools.

Charter school organizations like Mastery Charter School, with a consistent history of taking some of Philadelphia's lowest performing schools and closing the achievement gap within three years, has the experience needed to turn around these failing schools. In fact, of the initial set of Renaissance Schools to open in September 2010, Mastery was awarded three new charters, and was actually selected as the first choice by additional school communities.

The City of Philadelphia applauds Mastery's ability to change the lives of Philadelphia residents through education and supports their expansion application through the federal Charter Schools Program.

Sincerely,

A handwritten signature in cursive script that reads "Lori Shorr".

Lori Shorr, Ph.D  
Chief Education Officer



**School Advisory Council Final Recommendations**  
**Signature Page**

Top Recommendation: \_\_\_\_\_ Mastery \_\_\_\_\_

Second Choice Recommendation: \_\_\_\_\_ Young Scholars \_\_\_\_\_

Third Choice Recommendation: \_\_\_\_\_ Aspira \_\_\_\_\_

The School Advisory Council Turnaround Team match recommendations are based on the following:

- Review of school data;
- Review of school review;
- Review of Turnaround Team proposals;
- Review of site visit observations;
- Review of community feedback;
- Review of Turnaround Team Public Forum presentations.

We, the members of the \_\_\_\_\_ Harrity \_\_\_\_\_ School Advisory Council, affirm in our recommendations for Turnaround Teams to manage our school next year. Our decision was based on the above information and our rationale for making this recommendation is described in this document.



## School Advisory Council Final Recommendations Report

### Harrity School

#### Top Recommendation

<b>Turnaround Team:</b>
<b>Mastery</b>
<b>Rationale (highlight Turnaround Team strengths and/or weaknesses based upon any or all of the following- review of school data, school review, proposal, site visit observations, community feedback, and forum presentations):</b>
<p><u>Site Visit</u></p> <ol style="list-style-type: none"><li>1. Children spoke and stated what they wanted to learn</li><li>2. Well managed classrooms and hallways</li><li>3. Principal knew the students by name</li><li>4. Well disciplined</li><li>5. Small classrooms</li><li>6. Open classrooms</li><li>7. Good learning environment</li><li>8. Parent participation</li><li>9. Students did testimonials that were honest</li><li>10. Well mannered and well controlled</li><li>11. Firm principal status</li><li>12. Extremely focused</li><li>13. Excellent Program</li><li>14. Students enjoy coming to school</li><li>15. School was in excellent condition (Bright colors, college slogans visible on the Swalls</li></ol> <p><u>Proposal and Presentation</u></p> <ol style="list-style-type: none"><li>1. Strong family involvement</li><li>2. Believe they can work with any kind of child with ADHD or behavior issues</li><li>3. 27:1 class size</li><li>4. Excellent presentation</li><li>5. Proven track record</li><li>6. They've done it before in our community</li><li>7. Presentation and proposal were straight to the point</li></ol>



School Advisory Council Member Signatures (continued)

Print Full Name (First Name, Last Name)	School Affiliation (Parent/Guardian, Student, Community Member, or School Staff)	Signature	Date
Deecon Marsha Moore	S.W.P.P.A.C. P.T.O.	Marsha Moore	5-4-10
Kevin Scott	Parent	Kevin Scott	5-4-10
Juanita Wills	Parent	Juanita Wills	5-4-10
LISA Rice	Parent	LISA Rice	5-4-10
Maria Hurt	Parent	Maria Hurt	5-4-10
Syabo Bambe	Parent	Syabo Bambe	5/4/10
EDWARD BRACEY	WOMAN	Edward Bracey	5/4/10
Eloise Clayton	Southwest EPSC	Eloise Clayton	5/4/10
Christine Taylor	Good parent	Christine Taylor	5/4/10
Stephanie Taylor	PCRS	Stephanie Taylor	5/4/10
Latonia Tilghman	Parent	Latonia Tilghman	5/4/10
George Tilghman	Parent	George Tilghman	5/4/10



**School Advisory Council Final Recommendations**  
**Signature Page**

Top Recommendation: MASTERY

Second Choice Recommendation: YOUNG SCHOLARS

Third Choice Recommendation: UNIVERSAL

The School Advisory Council Turnaround Team match recommendations are based on the following:

- Review of school data;
- Review of school review;
- Review of Turnaround Team proposals;
- Review of site visit observations;
- Review of community feedback;
- Review of Turnaround Team Public Forum presentations.

We, the members of the MANN ELEMENTARY School Advisory Council, affirm in our recommendations for Turnaround Teams to manage our school next year. Our decision was based on the above information and our rationale for making this recommendation is described in this document.





## School Advisory Council Final Recommendations Report

### Top Recommendation

<b>Turnaround Team:</b>
<b>Mastery</b>
<b>Rationale (highlight Turnaround Team strengths and/or weaknesses based upon any or all of the following- review of school data, school review, proposal, site visit observations, community feedback, and forum presentations):</b>
The SAC determined that the turnaround team from Mastery gave an impressive presentation. The SAC and parents of Mann were very pleased with the information which they provided regarding their curriculum and school culture. They felt that Mastery really took the time out to do their homework on Mann and its surrounding community. SAC members were also quite pleased with the plan to bring Mann back to a K-6 <sup>th</sup> school and then students could be sent to into Shoemaker as a feeder school.

### Second Choice Recommendation

<b>Turnaround Team:</b>
<b>Young Scholars</b>
<b>Rationale (highlight Turnaround Team strengths and/or weaknesses based upon any or all of the following- review of school data, school review, proposal, site visit observations, community feedback, and forum presentations):</b>
The Mann SAC felt that the turnaround team from Young Scholars made an impressive presentation and the values upon which they have built their school are directly in line with what the parents and the SAC are looking to provide to the students of Mann. However the fact that there is no direct feeder school is a cause for concern by the entire body. There were also some feelings of discontent as to the CEO's lack of cultural sensitivity.

### Third Choice Recommendation

<b>Turnaround Team:</b>
<b>Universal</b>
<b>Rationale (highlight Turnaround Team strengths and/or weaknesses based upon any or all of the following- review of school data, school review, proposal, site visit observations, community feedback, and forum presentations):</b>
The SAC felt that the turnaround team from Universal Made a good presentation and has the backing which is needed to sustain themselves as a model for the Mann Community. However there was some concern with the academic achievement from the existing Universal school.



### School Advisory Council Member Signatures

Print Full Name (First Name, Last Name)	School Affiliation (Parent/Guardian, Student, Community Member, or School Staff)	Signature	Date
CONSTANCE DAVIS	Community Member	[Signature]	5/6/10
Mia Waters	Community Member	[Signature]	5/6/10
Nate Williams	Parent	[Signature]	5/6/10
Patricia Feichter	Parent	[Signature]	5/6/2010
Asha Peele	Parent	[Signature]	5/6/2010
Doris Flamer	Community member	[Signature]	5-6-2010
JANET JOHNSON	PARENT	[Signature]	5-6-10
Dee Williams	Parent	[Signature]	5-6-10
Japonica Rockness	Parent/School Staff	[Signature]	5-6-10
Cystal Anderson	community member	[Signature]	5-6-10
[Signature]	" "	[Signature]	6 May 2010
MALEE DEAN	PARENT	[Signature]	5/6/10
Lake Scott	Parent / Chair	[Signature]	5/6/10
Morgan Copher	community member	[Signature]	5/6/10
Sonia A. Lomon	resident	[Signature]	5/6/2010



**School Advisory Council Final Recommendations**  
**Signature Page**

Top Recommendation: Mastery Charter

Second Choice Recommendation: Universal Companies

Third Choice Recommendation: Young Scholars

The School Advisory Council Turnaround Team match recommendations are based on the following:

- Review of school data;
- Review of school review;
- Review of Turnaround Team proposals;
- Review of site visit observations;
- Review of community feedback;
- Review of Turnaround Team Public Forum presentations.

We, the members of the **Smedley School Advisory**

**Council**, affirm in our recommendations for Turnaround Teams to manage our school next year. Our decision was based on the above information and our rationale for making this recommendation is described in this document.

**School Advisory Council Member Signatures**

Page 1 of 3



## School Advisory Council Final Recommendations Report

### Top Recommendation

#### Turnaround Team:

#### Mastery Charter

**Rationale (highlight Turnaround Team strengths and/or weaknesses based upon any or all of the following- review of school data, school review, proposal, site visit observations, community feedback, and forum presentations):**

#### Strengths:

1. SAC members had very positive interactions with students and staff during their site visits.
2. Mastery was clear on the support and resources it would provide for special, education and behavioral health, especially for autistic support.
3. Parents felt that Mastery had clearly demonstrated that parent involvement was a high priority.
4. High priority on career and college preparation.
5. Extensive offerings of extracurricular activities.
6. Mastery has a nationally recognized program.
7. Smedley students would have the opportunity to stay within the Mastery system until graduation.
8. Demonstrates that they provide a high level of attention for all students, not only to those with behavioral problems.
9. Mastery is interested in adding grade 6.
10. Clear focus on North Philadelphia.

#### Weaknesses

- 1.



### School Advisory Council Member Signatures

Print Full Name (First Name, Last Name)	School Affiliation (Parent/Guardian, Student, Community Member, or School Staff)	Signature	Date
Ninette Cooper	Community member	Ninette Cooper	04 May 2010
Jason Dawkins	Community Member	Jason Dawkins	5/4/10
JERDISE STATION	School District	Jerdise Station	5/4/10
Belinda Nelson	La 2nd Ward leader	Belinda Nelson	5/4/10
Ineka Hand	Parent	Ineka Hand	5/4/10
Kathy Beem	Parent	Kathy Beem	5/4/10
Kimberly Washington	Community Member	Kimberly Washington	5/4/10
Cecil Parsley	Community member	Cecil Parsley	5/4/10
Faithman Saylor	Community member	Faithman Saylor	5/4/10
Demetrius Watson	School District	Demetrius Watson	5/7/2010
Sharon WRIGHT	STAFF COMMUNITY	Sharon Wright	5/4/10
Mozell Boorer	Parent / Community	Mozell Boorer	5/4/10
HARRY D. DILLON	PARENT / Community Member	Harry D. Dillon	5/4/10
Maureen J. Kee	Parent / Community Member	Maureen J. Kee	5/4/10
TORRE SANTANA	Community Member	Torre Santana	5/4/10
Charlene Young	Parent / Volunteer	Charlene Young	5/4/10
Cherelle Jones	Parent	Cherelle Jones	5/4/10

5-4-10

Smedley

1. Charo Feliciano (215) 289-2806 Julines98@yahoo.com
2. Mozell Brewer (215) 744-4167 mowzel-mozell@yahoo.com
3. Juliet Reyes 267-776-5501 reyesju-09142002@yahoo.com
4. Kathy Beem (215) 839-2333 Kathy33-2005@yahoo.com
5. DENISE STATION (215) 537-2783 dstation@temple.edu
6. Belinda Nelson (215) 533-4676 belindanelson2008@yahoo.com
7. Ineka Hardy (215) 626-3991
8. Kimberly Washington (215) 701-2588 kwashington@coraservices.org
9. Faithann Saylor (215) 533-1445 f.saylor@yahoo.com
10. JORGE SANTANA 215-744-7901 jsantana@pcnusa.net
11. Sharon WRIGHT 215-821-2558 Shwra972000@yahoo.com
12. Ninette Cooper (215) 743-7515 (267) 973-6090 coopern@comcast.net
13. Kelli Murray 215-743-5439 kmur102076@aol.com
14. IKESHA HALL 1747 BRIDGE STREET 215-475-4721 CELL#
15. SABINA FORD (267) 298-7296 TBFORD@gmail.com
16. Daniel Watson (267) 679-6527 ~~dwatson2~~ dwatson2@philab.org
17. Cecil Parsley 267-505-4658 Cshirts4u@gmail.com
18. Helena Cohnol 267-290-7480
19. Mawell J. Lee 267-595-0134 mom2one30philly@hotmail.com
20. Harry A. DuBille 267-238-1403 HARRY-DuBille@MSN.com
21. Charlene Young 267-257-7654 cyoung@resourcedirectmarketing.com



Smedley

[illegible]

**School Advisory Council Member Signatures (continued)**

Page 2 of 3

Jeff Yass  
214 Cheswold Lane  
Haverford, PA 19041

MATCH #

June 29, 2010

The Honorable Arne Duncan  
Secretary of Education  
U.S. Department of Education  
400 Maryland Avenue, SW  
Washington, DC 20202

Dear Secretary Duncan:

I am writing to express my support of Mastery Charter School's goal to enhance school choice in the Philadelphia region. Its turnaround model for failing public schools in the School Districts of Philadelphia and Camden will revive these schools to the high performing academic institutions they were intended to be.

As a long-time resident of the Philadelphia area and a committed school choice advocate, I am highly invested in seeing school reform prompted by quality choice providers like Mastery Charter School. Mastery's "no excuses" approach and proven track record of success make it a strong candidate for investment as the federal government selects charter operators to increase the number of high quality charter schools nationwide over the next five years.

Because of my deep commitment to this effort, I have committed \$1,000,000 to support Mastery's expansion efforts over the next five years. As requested by your grant competition, I guarantee that these funds will be deposited in full to Mastery's account at the time an award notification is made later this summer or early this fall.

I look forward to being Mastery's partner as education reform takes hold in the Philadelphia region.

Sincerely,



Jeff Yass



June 28, 2010

The Honorable Arne Duncan  
Secretary of Education  
U.S. Department of Education  
400 Maryland Avenue, SW  
Washington, DC 20202

Dear Secretary Duncan,

NewSchools Venture Fund is a venture philanthropy organization working to transform public education by investing in educational entrepreneurs and connecting their work to systems change. Since our founding, we have made portfolio-level investments in 35 nonprofit organizations, including nonprofit charter management organizations (CMOs), school support organizations, accountability and performance tools, and human capital providers. Mastery Charter School is one of the organizations where we have both invested and seen remarkable results.

**As a part of their application in the Charter Schools Program Expansion competition we have committed to support them with non-federal matching funds of \$1,000,000.**

Of the few organizations with any school turnaround track record, only Mastery has a proven management and instructional model that has closed the achievement gap for high-need students across multiple schools that were previously failing and has sustained such gains over time. While Mastery is poised to double in size in 2010-11, their strategic plan also calls for adding approximately 7,000 additional students over the next five years, building their capacity in the Philadelphia Region and making them a prime candidate for transferrable learning for other charter operators nationally who are interested in building capacity to do turnaround work in other cities. Mastery continues to not only invest in their people through high-quality professional development and coaching, but in quality data systems so that every decision at the school or classroom level is informed by individual student-level data in the pursuit of academic excellence for every child.

Mastery has the capacity to expand high quality charter schools right now and we believe the next five years will provide an optimal environment for this expansion in the Philadelphia/Southern New Jersey metropolitan area. We support their application in the CSP Expansion competition and are willing to provide any documentation you may need in regard to our matching allocation.

Sincerely,



Jordan Meranus  
Partner, NewSchools Venture Fund

# Project Narrative

## Section 3 - Other Attachments: Proof of Non-Profit Status, or not for-profit status

Attachment 1:

Title: **IRS Non Profit Status** Pages: **1** Uploaded File: **MCHS Updated IRS Ruling Letter 501c3.pdf**

Internal Revenue Service  
P.O. Box 2508  
Cincinnati, OH 45201

Department of the Treasury

Date: FEB 08 2007

MASTERY CHARTER HIGH SCHOOL  
% SCOTT GORDON  
35 SOUTH 4TH STREET  
PHILADELPHIA PA 19106

Person to Contact:

Barb Herald  
ID #31-02637

Toll Free Telephone Number:

877-829-5500

Employer Identification Number:

23-3060542

Dear Sir or Madam:

This is in response to your request of October 13, 2006, regarding your tax-exempt status. We have updated our records to reflect the name change as indicated above.

Our records indicate that a determination letter was issued in November 2001 that recognized you as exempt from Federal income tax. Our records further indicate that you are currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records also indicate you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section 509(a)(1) and 170(b)(1)(A)(ii).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,



Cindy Westcott  
Manager, Exempt Organizations  
Determinations

# Project Narrative

## Section 4 - Other Attachments: Schools Operated by Applicant

Attachment 1:

Title: **Mastery Schools Operated by Applicant Section 4** Pages: **36** Uploaded File: **Section 4 SOBA CSP final upload 36 pp.pdf**

## SECTION 4: OTHER ATTACHMENTS

### SCHOOLS OPERATED BY THE APPLICANT

#### a. Copy of the Charter Agreement

- i. Charter Agreement for Applicant – Mastery Charter HS pp. 2-22
- ii. Copy of first page of Charter Agreements per Campus:
  - Thomas p. 23
  - Shoemaker p. 24
  - Pickett p. 25
- iii. School Reform Commission Resolutions Approving:
  - 2010-15 Charter Renewals MCHS pp. 26-27
  - 2010-15 Charter Renewal MC @ Thomas pp. 27-28
  - 2010-15 Charter Authorization Harrity Campus pp. 28-29
  - 2010-15 Charter Authorization Mann Campus pp. 29-30
  - 2010-15 Charter Authorization Smedley Campus pp. 30-31
- iv. State of New Jersey Charter Authorization Letter and Deferred opening to Fall 2011 pp. 32-34

#### b. Documentation of Mastery Charter Schools establishment and recognition as separate schools under state law (confirmation – O'Donnell Associates)

p. 35

#### c. N/A – Charter agreements attached in “a” are the performance agreements for charters

#### d. Physical Locations of Schools

p. 36

#### e. Documentation of Separate Facilities, Students, Staff (included on pp. 35-36 in existing documents)

#### f. Documentation of daily operation separation by location (included on pp. 35-36 in existing documents)

*No formal charter agreements have been executed on the 2010 renewals, new 2010 charters, or future charters due to timing of Approval (June 2010). These can be provided as soon as executed. State-controlled, SRC Resolution serves as authorizing legislation until charter agreement is executed. Charter Applications are 200+ pages each, and are publicly available.*

(M) (A) (S)

Contract No. 012/F06

School Reform Commission  
Resolution No. SRC-12  
dated March 16, 2005 and  
Resolution No. SRC-6  
dated April 20, 2005

THE SCHOOL DISTRICT OF PHILADELPHIA

CHARTER

FOR

MASTERY CHARTER HIGH SCHOOL

---

**THIS CHARTER** (the "Charter") is made and entered into as of August 2, 2005 (the "Execution Date"), by and between the SCHOOL REFORM COMMISSION (the "SRC") of THE SCHOOL DISTRICT OF PHILADELPHIA (the "School District"), with its principal place of business at 440 North Broad Street, Philadelphia, Pennsylvania 19130, and MASTERY CHARTER HIGH SCHOOL, a Pennsylvania nonprofit corporation (the "Charter School") acting through and by its Board of Trustees (the "Charter Board"), with its principal place of business at 35 S. 4<sup>th</sup> Street, Philadelphia, PA 19106.

RECITALS

**WHEREAS**, on December 21, 2001, pursuant to the authority granted under Section 6-691(c) of the Public School Code of 1949, 24 P.S. § 1-101 *et seq.*, as amended (the "School Code"), the Secretary of Education of the Commonwealth of Pennsylvania (the "Secretary") issued a certificate declaring The School District of Philadelphia to be in distress, and the SRC was appointed pursuant to Section 6-696 of the School Code, 24 P.S. § 6-696, as amended by Act 2001, Oct. 30, P.L. 828, No. 83 ("Act 83"); and

**WHEREAS**, pursuant to Section 6-696 of the School Code, the SRC (i) is responsible for the operation, management and educational program of the School District; (ii) is vested with all powers and duties granted to the board of school directors (the "Board of Education") of the School District; and (iii) is authorized, *inter alia*, to grant charters and to enter into agreements for the operation of charter schools in accordance with the Charter School Law, 24 P.S. § 17-1701-A, *et seq.* (the "Charter School Law") and Act 83; and

**WHEREAS**, pursuant to Section 696 of the School Code, the SRC has the power to approve an application to establish and operate a charter school; and

**WHEREAS**, the founding coalition of the Charter School submitted to the Board of Education an Application to operate the Charter School ("the Application"); and

**WHEREAS**, the Board of Education of the School District duly approved said Application and authorized the issuance of a charter to the Charter Board for a term of four (4) years commencing on September 1, 2001; and

**WHEREAS**, on or about November 15, 2004, the Charter Board filed its application for renewal of its charter with the School District; and

**WHEREAS**, on March 16, 2005, the SRC adopted Resolution SRC-12 and on April 20, 2005, the SRC adopted Resolution SRC-6 (collectively, the "Resolutions") attached hereto as Exhibit A and made a part hereof, which authorized the renewal of the Charter for the Charter School upon meeting the condition(s) set forth in said Resolutions; and

**WHEREAS**, the Charter Board is authorized to sign this Charter;

**NOW THEREFORE**, in consideration of the promises and the mutual covenants and agreements set forth herein, the SRC and the Charter School intending to be legally bound, hereby mutually agree to the above Recitals and the following:

### **GRANT OF CHARTER**

Subject to all of the terms and conditions set forth in this Charter, the SRC hereby grants to the Charter Board this Charter to operate the Charter School as a public school under and pursuant to the Charter School Law and all other Applicable Laws (as hereinafter defined), commencing on September 1, 2005 (the "Effective Date") and ending on June 30, 2010, unless earlier terminated pursuant to the terms of this Charter or Applicable Laws (the "Term").

It is specifically understood and agreed between the parties hereto that:

1. The Charter School shall comply with the Resolutions, common law, court decisions, court orders, the Charter School Law, the Individuals With Disabilities Education Act, 20 U.S.C.S. §1400 *et seq.* ("IDEA"), the No Child Left Behind Act, P.L. 107-110, and all other applicable state, federal and local laws, statutes, codes, ordinances and regulations as in effect from time to time ("Applicable Laws"). In furtherance of and without limitation to the covenants contained herein, the Charter School shall comply with Applicable Laws prohibiting discrimination on the basis of disability, race, age, creed, color, gender, religion, marital status, veteran status, national origin, ancestry and any other protected category or classification as required by law, and shall not unlawfully discriminate in student admissions, hiring and operations. Any reference in this Charter to any statute or ordinance shall mean such statute, as the same may hereafter be duly amended.

2. The Application, including the representations, certifications and assurances set forth therein, is hereby incorporated in this Charter as if set forth herein in full. As used in this Charter, "Application" means the application originally filed by or on behalf of the Charter School and the Charter Board in connection with the original issuance of a charter to the Charter Board for the Charter School, as said application may subsequently have been amended by (a) duly authorized agreement of the SRC and the Charter Board, or (b) the Charter Board's application for approval of the renewal ("Application for Renewal") of its Charter, or (c) both. To the extent that materials submitted to the School District in connection with an Application

for Renewal of an existing charter should reasonably be construed as amendments to the Application, the Charter Board and the School District acknowledge and agree that the original application shall be deemed amended thereby and such amendment or amendments shall constitute part of the "Application " only to the extent that the SRC has specifically approved by resolution any differences in policies, procedures or terms of operation between the application and the Application for Renewal.

2. The Charter Board agrees that it shall operate the Charter School in strict adherence to: (a) the terms of the Application, attached hereto as Exhibit B; (b) the Statement of Assurances, and all Application appendices and attachments referred to therein (collectively, the "Statement of Assurances"), attached hereto as Exhibit C; (c) the Accountability Agreement ("Accountability Agreement"), attached hereto as Exhibit D; and (d) the Standard Terms and Conditions ("Standard Terms and Conditions"), attached hereto as Exhibit E; all as submitted by the Charter Board and approved by the SRC and School District staff.

3. The Charter School shall provide to the School District no later than August 29, 2005 the documents ("Required Documentation"), in form and substance acceptable to the School District, set forth on Exhibit F. If the Charter Board fails to provide the Required Documentation to the School District by August 29, 2005, the SRC and/or the School District may withhold payments to the Charter School, may revoke the Charter, may declare the Charter void, and/or may benefit from any other remedies provided by the Charter School Law or Applicable Laws. The Charter Board shall report to the School District any changes to the Required Documentation during the Term of this Charter within fifteen (15) days after the occurrence of the change. Additionally, in accordance with the Applicable Laws, the Charter School shall maintain on-site at its facility for inspection by the School District and its representatives and agents all of certain current Charter School records ("Current Charter School Records") as set forth on Exhibit G attached hereto and made a part hereof.

4. The Charter School, during the Term of this Charter, shall operate facilities located at the following addresses: 35 S. 4<sup>th</sup> Street, Philadelphia, PA 19106 and at the former Thomas School at 927 Johnston Street, Philadelphia, PA 19148.

5. The Application, Statement of Assurances, Accountability Agreement, Standard Terms and Conditions, and Required Documentation, and all other Exhibits, appendices and attachments hereto are incorporated herein by reference as if fully set forth. This Charter and all Exhibits hereto constitute a legally binding agreement for the Term set forth above and the terms of this Charter cannot be changed absent a written amendment to this Charter signed by both parties.



6. Notices required by this Charter shall be sent to the following individuals:

	School District	Charter School
Name:	James F. Nevels	Scott Gordon
Title:	Chairman	Chief Executive Officer
Address:	School Reform Commission Administration Building Room 114 2120 Winter Street Philadelphia, PA 19103	Mastery Charter High School 35 South 4 <sup>th</sup> Street Philadelphia, PA 19106

With required copy to:

	School District	Charter School
Name:	Charter School Office	Robert W. O'Donnell, Esquire
Title:	Executive Director	
Address:	The School District of Philadelphia Charter School Office Administration Building - Rm. 309 2120 Winter Street Philadelphia, PA 19103	O'Donnell Associates 1515 Market Street Suite 1800 Philadelphia, PA 19102

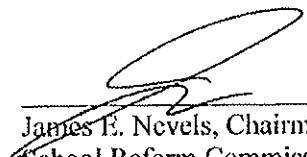
7. The School District reserves the right to terminate and or revoke this Charter in accordance with 24 P.S. §17-1729-A and Applicable Laws. This Charter may be terminated by mutual written agreement prior to the expiration of the Term, which agreement shall state the effective date of termination. The Charter School and the School District agree that unless the safety and health of the students and or staff is otherwise threatened, the effective date of termination by mutual agreement will be at the end of a semester or academic year. After the disposition of any liabilities and obligations of the Charter School, any remaining assets of the Charter School shall be distributed on a proportional basis to the school entities (as defined in 24 P.S. § 17-1703-A) with students enrolled in the Charter School for the last full or partial school year of the Charter School.

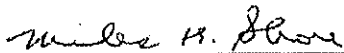
8. This Charter may not be transferred or assigned by the Charter School.

IN WITNESS WHEREOF, the undersigned have executed this Charter the day and year first written above.

THE SCHOOL REFORM COMMISSION  
OF THE SCHOOL DISTRICT OF  
PHILADELPHIA

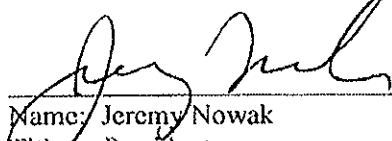
APPROVED AS TO FORM:


By:   
James E. Nevels, Chairman  
School Reform Commission

  
Interim General Counsel

MASTERY CHARTER HIGH SCHOOL

ATTEST:

By:   
Name: Jeremy Nowak  
Title: President

By:   
Name: Ron Biscardi  
Title: Secretary

SRC-12  
March 16, 2005

**RESOLUTION**

WHEREAS, pursuant to the Charter School Law, 24 Pa. C.S.A. § 17-1701-A, *et. seq.*, the Board of Education of the School District of Philadelphia granted a charter to the Board of Trustees of MASTERY CHARTER HIGH SCHOOL ("the Charter School") on September 1, 2000 to operate a charter school from September 1, 2001 through August 31, 2005; and

WHEREAS, the Charter School seeks renewal and expansion of its Charter; and

WHEREAS, pursuant to Act 83 of 2001, the Commonwealth amended §696 of the Public School Code, entitled "Distress in school districts of the first class" and, as so amended, § 696(e)(1) states: "[a]ll powers and duties granted heretofore to the board of school directors of a school district of the first class under this act or any other law, including its authority to levy taxes and incur debt, shall be vested in the School Reform Commission..."; and

WHEREAS, pursuant to § 691 of the School Code, the Pennsylvania Secretary of Education declared the School District of Philadelphia (the "School District") to be a distressed school district effective December 22, 2001, and pursuant to § 696 of the School Code, a School Reform Commission ("SRC") has been appointed; and

WHEREAS, the SRC has reviewed the Charter School's request for renewal, the information sought during the renewal process and examined school and student performance; now be it

**RESOLVED**, that the Charter School must by April 1, 2005:

- Submit evidence that 75% of the professional staff is certified in accordance with the Charter School Law; and be it

**FURTHER RESOLVED**, that upon meeting the requirement set forth in the paragraph above, the request for renewal of the charter for a period commencing on September 1, 2005 and ending on August 31, 2010 shall be GRANTED upon signing a new Charter Agreement. Renewal of the Charter will not take effect until the Charter Agreement has been signed by the President of the Board of Trustees of the Charter School or another member of the Board duly designated by the President; and be it

**FURTHER RESOLVED**, that upon meeting the requirement set forth above, the Charter School's request for expansion of grades and enrollment is hereby GRANTED and the school shall be authorized to enroll a maximum of 600 students and serve grades 7 through 12.

SRC-6  
April 20, 2005

WHEREAS, pursuant to Act 83 of 2001, the Commonwealth amended §696 of the Public School Code, entitled "Distress in school districts of the first class" and, as so amended, §696(e)(1) states: "[a]ll powers and duties granted heretofore to the board of school directors of a school district of the first class under this act or any other law, including its authority to levy taxes and incur debt, shall be vested in the School Reform Commission... "; and

WHEREAS, pursuant to § 691 of the School Code, the Pennsylvania Secretary of Education declared the School District of Philadelphia (the "School District") to be a distressed school district effective December 22, 2001, and pursuant to § 696 of the School Code, a School Reform Commission ( "SRC") has been appointed; and

WHEREAS, §696(k)(2)(v) states that the SRC may approve or designate a school as a charter school; and

WHEREAS, the SRC wishes to replicate successful charter schools in other areas of Philadelphia; and

WHEREAS, the SRC has identified Thomas Middle School, located at 927 Johnston Street, Philadelphia, PA 19148 as an appropriate school to convert to a charter school; and

WHEREAS, the Board of Trustees of Mastery Charter School ("Mastery") submitted a proposal; NOW  
BE IT

RESOLVED, that Thomas Middle School shall be converted to a charter school and operated by the Board of Trustees of Mastery Charter School as a second campus provided the following are met:

Mastery shall submit the items below for approval by the SRC, and if so approved, shall receive a charter to operate the above-mentioned charter school commencing in school year 2005/06:

1. Evidence that the Board has met and authorized the signing of a charter school contract for a second campus; and
2. A detailed proposal for the composition and operation of the Board of Trustees, including a list of initial board members and specific provisions for the replacement of board members. No governance plan will be approved in which the majority of board seats are held by representatives of organizations that are unrelated to the subject school's parents, staff and local community; and

3. A detailed proposal for the improvement of academic outcomes for students in the subject school, including proposals for school management, instructional design, school calendar, curriculum and instruction, staff recruitment, professional development, special education, school climate/school safety, and other components of instructional strategy; and
4. A set of measurable minimum targets for academic improvement that the school will be expected to reach in each year of the charter school's charter in order to maintain its status as a charter school. Conversion proposals will not be approved unless the measurable minimum targets represent improvements in academic achievement levels, compared to current performance; and
5. A proposal for parent/caregiver involvement and community involvement in advancing the school's academic objectives; and
6. A public accountability plan that will periodically inform the SRC and the community at large as to the school's performance, including measures of academic achievement, attendance rates, promotion rates, and school climate/school safety; and
7. Proof that the details of the school conversion plan have been shared with parents in the school catchment area who have children eligible to attend the subject charter school, and evidence can be presented that there is strong parental support for the conversion plan; and
8. Evidence that the charter school is registered under section 501(C)(3) of the Internal Revenue Code as a nonprofit organization; and be it

FURTHER RESOLVED, that upon approval of the above-mentioned submissions, Mastery shall receive a charter containing the terms and conditions of the agreement between the SRC and the charter board, including provisions related to the facility; and be it

FURTHER RESOLVED, that the above-described charter school, upon approval, may enroll up to six hundred (600) students, serve grades as follows:

2005/06: Enrollment cap of two hundred-forty (240), grades six through eight;  
2006/07: Enrollment cap of three hundred-sixty (360), grades seven through nine;  
2007/08: Enrollment cap of four hundred-forty (440), grades seven through ten;  
2008/09: Enrollment cap of five hundred-fifty (550), grades seven through eleven;  
2009/10: Enrollment cap of six hundred (600), grades seven through twelve; and be it

FURTHER RESOLVED, that all students attending Thomas Middle School at the time of conversion shall be offered enrollment in the charter school. The charter school will have admissions preferences thereafter for up to 95% of the population for students who reside in the catchment area (to be determined by the School District).

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EXHIBIT B  
APPLICATION

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EXHIBIT C

STATEMENT OF ASSURANCES

**The School District of Philadelphia**  
**Statement of Assurances for**  
**Charter School Applicants for 2005-2006**

By duly authorized signature below, Mastery Charter High School ("Charter School") hereby agrees that the following terms and conditions will prevail for any charter school that may be established through the attached Charter School Application, and understands that any material deviation from any of these terms and conditions is cause for revocation or nonrenewal of any charter that may be granted by the School Reform Commission of The School District of Philadelphia ("SRC") at any time during the term of such charter:

- 1) The Charter School will comply with all applicable federal and state laws and regulations, and the authorizing legislation for charter schools.
- 2) The Charter School will be nonsectarian in all operations.
- 3) The board of trustees of the Charter School ("Charter Board") has been authorized to sign a written contract with the SRC. The Charter School will submit the formal resolution adopted by the Charter Board to the SRC according to the timelines specified in SRC Resolution No. SRC-12, dated March 16, 2005 and SRC Resolution No. SRC-6, dated April 20, 2005.
- 4) The Charter School will provide a minimum of one-hundred eighty (180) days of instruction or nine hundred (900) hours per year of instruction at the elementary level, or nine hundred ninety (990) hours per year of instruction at the secondary level.
- 5) Prior to employing any individual who shall have direct contact with students, the Charter School shall ensure that criminal history and child abuse/injury records are obtained in compliance with §1-111 of the Public School Code and 23 Pa. C.S.A. subchapter C2, regarding background checks.
- 6) The Charter School will provide the SRC with access to all of its records and facilities to ensure that the Charter School is in compliance with its written charter.
- 7) The Charter School will reimburse the School District for all student participation in extra-curricular activities according to the established fee schedule.
- 8) The Charter School will utilize a management structure that is consistent with Charter School Application Appendix B: Required Management Organization of the Board of Trustees and Requirements for Bylaws.
- 9) The Charter School will enroll each student using the School District of Philadelphia's School Computer Network.
- 10) The Charter School will administer the School District's citywide academic assessments and set forth as a minimum performance standard the performance targets associated with the academic components of the School District's professional responsibility system, and the annual yearly progress as required by "No Child Left Behind".
- 11) The Charter School will adopt an admissions policy in accordance with charter school legislation Sections 1723-A and 1730-A. In the event of a surplus of applicants, the Charter School immediately shall notify the School District if it intends to conduct an admissions "lottery" so that the School District may place an observer at the Charter School to monitor such a lottery.
- 12) The Charter School will send letters of intent to all school districts from which the Charter School could reasonably expect to draw at least 25 percent of its students.
- 13) The Charter School will submit the following legal documentation to the SRC according to the timelines specified in SRC Resolution No. SRC-12, dated March 16, 2005 and SRC Resolution No. SRC-6, dated April 20, 2005:
  - a) Evidence that the Charter School itself has been organized as a public nonprofit corporation in accordance with Section 1714-A of Act 22 of 1997;
  - b) Valid occupancy certificates for each facility serving the Charter School's students;



- c) Fire and health and safety regulation compliance as set forth by the City of Philadelphia;
  - d) A copy of a signed lease or recorded deed for each facility serving the Charter School's students.
- 14) The Charter School will submit the following to the SRC according to the timelines specified in SRC Resolution No. SRC-12, dated March 16, 2005 and SRC Resolution No. SRC-6, dated April 20, 2005:
- a) Employment Verification forms, which will be supplied by the School District, indicating that a sufficient staff with complete and appropriate criminal and child abuse records checks have been hired to serve the actual enrollment of the Charter School;
  - b) Student Enrollment Notification forms, which will be supplied by the School District, signed by the parent/legal guardian, indicating that a sufficient number of students have enrolled in the proposed Charter School;
  - c) Evidence that the Charter School has obtained the insurance coverages required by the charter as set forth in Exhibit E attached to the charter and made a part thereof.
- 15) The Charter School will comply with the *Provision of Special Education Services to Charter School Students: Guidelines*, attached hereto as Exhibit C-1 and made a part hereof.
- 16) The Charter School adopts detailed procedures for suspension and expulsion that comply with the Public School Code, including due process.
- 17) The Charter School will meet the legal, professional and ethical standards for maintaining school records and disseminating information.
- 18) The Charter School will follow State child accounting procedures (24 PS 13-1332).
- 19) If the Charter School plans to offer food services, State regulations for student participation must be followed (24 PS 13-1337).
- 20) The Charter School will adopt a plan for providing school health services that complies with Article XIV of the Public School Code.
- 21) The Charter School's insurance coverage plans, including health, general liability (including school operation, extra-curricular activities and parent volunteer activities), property, and Director's and Officer's liability coverage is in compliance with Section 1724-A of the Charter School legislation. The Charter School offers a health benefits package comparable to the local school district's package as required in Section 1724-A of the charter school legislation.
- 22) The Charter School will be responsible for insuring, safeguarding and replacing all equipment on loan from the School District of Philadelphia, including, but not limited to computers, modems, and other equipment necessary for the School Computer Network.
- 23) The Charter School will develop a purchasing procedure that addresses a competitive way to purchase goods and services. (For additional financing procedures see Section 1725-A of the Charter School Legislation.)
- 24) The Charter School will follow the financial procedures listed in Charter School Application Appendix C: Required Financial Procedures.
- 25) The Charter School will have a plan for regular financial reviews and audits in accordance with Section 1719-A of the charter school legislation.
- 26) The Charter School's board of trustees agrees to direct the Charter School's staff to record and report daily attendance on the School Computer Network.

Signature Duly Authorized Representative of Charter School

*Scott Gordon*

Date  
8/19/05

Typed Name and Title of Authorized Representative

Scott Gordon, CEO

## EXHIBIT C-1

### THE SCHOOL DISTRICT OF PHILADELPHIA

#### Provision of Special Education Services to Charter School Students Guidelines

The following duties will apply to charter schools:

- 1) Each charter school is responsible for providing a free appropriate public education to students with disabilities enrolled in that charter school who have been determined by an Individualized Education Program (IEP) team to require specially designed instruction. The cost of implementing the specially designed instruction will be borne by the Charter School. Students provided such services by the Charter School and with a valid Nora, CER and IEP will be considered eligible for additional special education payment to the Charter School. Charter schools are required to input relevant data to the School Computer Network (valid dates of Nora, CER and IEP) and submit the first page of the IEP to the School District. The appropriate format for an IEP may be found at [http://www.pde.state.pa.us/special-edu/lib/charter-annotated-IEP\\_w.pdf](http://www.pde.state.pa.us/special-edu/lib/charter-annotated-IEP_w.pdf). Assuming valid Nora and CER, payments are effective as of the date listed on the IEP.
  - 2) Each charter school must ensure full compliance with the Individuals with Disabilities Education Act (IDEA). This includes, but is not limited to child find, identification, and procedural safeguards, including: access to records, appointment of surrogate parents, notice, opportunity for mediation of disputes, the right to a due process hearing, and assurance of the Free and Appropriate Public Education (FAPE).
  - 3) Each charter school must ensure that students who are suspected of having disabilities are properly evaluated and re-evaluated at established intervals required by IDEA, using culture-fair, non-biased assessment tools, by properly certified personnel, adhering to required timelines, and providing required notification to parents.
  - 4) When a student enrolled in a charter school presents a valid and current IEP, and/or the charter school IEP team determines that a student with disabilities requires specially designed instruction, the charter school must ensure that the IEP is implemented in accordance with the IDEA, and reviewed at least annually.
  - 5) Charter schools must maintain the confidentiality of personally identifiable information regarding students with disabilities as per the Family Educational Rights and Privacy Act (FERPA) and IDEA.
  - 6) The charter school is responsible for providing the names of all students eligible for special education services provided by the charter school along with all other data required for the federal child count. This data is to be submitted electronically through the District's School Computer Network (SCN) no later than November 30 of each year.
  - 7) Continuation of the additional special education payment is contingent on the Charter School maintaining current and valid IEP, Nora and CER documentation. As stated in Section 1728-A of Act 22 of 1997, the Charter School will provide to the School District "ongoing access to records and facilities of the Charter School to ensure that the Charter School is in compliance with its charter and this Act and that requirements for testing, civil rights, and student health and safety are being met."
  - 8) Verification of students' eligibility for the additional special education funding will be based on the Charter School's performance of all necessary procedures relative to the evaluation and re-evaluation for special education services in accordance with the timelines and criteria specified by law.
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## EXHIBIT D

### ACCOUNTABILITY AGREEMENT

The attached document outlines the Accountability Agreement between the School District of Philadelphia and each newly formed charter school. The Agreement includes an accountability/school improvement plan that must identify specific student performance, school operations and compliance indicators, as well as anticipated achievement levels for those indicators. In addition to the required components, the Agreement provides a voluntary opportunity for each charter school to develop unique standards and assessments that reflect the unique mission of each school and measure students' achievement in these unique areas. **An approved charter school is expected to enter into an Accountability Agreement and complete an accountability plan as part of its Charter with the School District.** (Accountability and school improvement information, including a sample plan template, can be found on the Pennsylvania Department of Education web site: [www.pde.state.pa.us](http://www.pde.state.pa.us); type "getting results" in the site search box.)

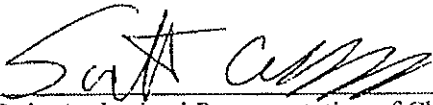
## ACCOUNTABILITY AGREEMENT

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In accordance with the federal law, No Child Left Behind, the Public School Code and the Charter School Law, the School District of Philadelphia has implemented an accountability system which includes, but is not limited to, the following:

- Development of an Accountability /School Improvement Plan
- Monitoring of student performance goals and all other requirements as per "No Child Left Behind"
- Participate in any accountability related site visits as required by the School District of Philadelphia as per "No Child Left Behind"

We agree to participate in and comply with all aspects of the School District of Philadelphia's Accountability System.



Signature Duly Authorized Representative of Charter School



Date



Typed Name and Title of Authorized Representative

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## EXHIBIT E

### STANDARD TERMS AND CONDITIONS

#### I. INSURANCE

##### a. Insurance Requirements.

All insurance policies required hereunder shall be maintained in full force and effect for the Term of this Charter. Each policy shall contain the provision that there is to be thirty (30) days prior written notice given to the School District in the event of cancellation, non-renewal, or material change to the insurance coverages. A certificate of insurance evidencing all insurance coverages as outlined below, shall be provided to the School District for review, seven (7) working days prior to the execution of this Charter. Within thirty (30) days of the Effective Date, certified copies of all insurance policies required by this Charter shall be delivered to the School District for review. The insurance companies indicated as the carriers on the insurance certificates, shall be authorized to do business in the Commonwealth of Pennsylvania, shall have a Best rating no less than "A," and the carriers shall be acceptable to the School District. The School District and the SRC shall be named as Additional Insureds, ATIMA, with respect to all coverages, except Workers' Compensation and professional liability/malpractice insurance. The Charter School's liability insurance coverage shall be endorsed to state that its coverage will be primary to any other coverage available to the SRC and School District and its officers, employees and agents, and that no act or omission of the School District will invalidate the coverage and that the insurance company waives subrogation against the School District, and any of the School District's officers, employees and agents and the SRC and any of its members.

The Charter School shall maintain the following insurance policies in full force during the term of this Charter:

##### 1. Commercial General Liability:

Commercial General Liability coverage, on an occurrence basis, including Contractual Liability, with limits not less than the following: (a) \$2,000,000 General Aggregate (including bodily injury, or property damage or both); (b) \$2,000,000 Products -- Completed Operations Aggregate; (c) \$1,000,000 Per Occurrence; (d) \$1,000,000 Personal and Advertising Injury; (e) \$500,000 Fire Damage or Fire Legal Liability; and \$5,000 Medical Expense (any one person).

##### 2. Automobile Liability:

Automobile coverage with limits not less than the following: \$1,000,000 Combined Single Limit for all owned autos and/or hired / non-owned autos.

##### 3. Workers' Compensation and Employers Liability:

a. Workers' Compensation coverage for its employees with limits not less than the statutory limits for the Commonwealth of Pennsylvania.

b. Employer's Liability: \$100,000 Each Accident-Bodily Injury by Accident; \$100,000 Each Employee-Bodily Injury by Disease; and \$500,000 Policy Limit-Bodily Injury by Disease. Other states insurance including Pennsylvania.

##### 4. Excess / Umbrella Liability:

The Charter School shall maintain Excess / Umbrella Liability coverage in an amount not less than \$4,000,000 per occurrence. The Excess/Umbrella Policy shall schedule all underlying liability coverages required under the Charter unless a separate \$4,000,000 limit is maintained for Professional Liability.

5. Professional Liability/Educators Liability/ Malpractice/Errors and Omissions Insurance.

Professional Liability/Educators Liability / Malpractice/Errors and Omissions Insurance with limits not less than the following: (a) \$1,000,000 General Aggregate; (b) \$1,000,000 Per Occurrence. The Charter School shall obtain a Sexual Molestation and Child Abuse Endorsement.

6. Directors and Officers Liability:

The Charter School shall maintain Directors and Officers Liability Insurance in an amount not less than \$1,000,000.

b. No effect on indemnity Obligations:

The insurance requirements set forth in this Charter are not intended and shall not be construed to modify, limit or reduce the indemnification obligations set forth below or limit the Charter School's liability to the limits of the policies of insurance required to be maintained hereunder.

2. INDEMNIFICATION; LITIGATION COOPERATION; NOTICE OF CLAIMS:

a. The Charter School hereby agrees to indemnify and hold harmless the School District, Board of Education, the SRC and any governing body authorized to carry out the terms, supervise, or have any control over of this Charter and their respective members, designees, agents, directors, employees and representatives ("the Indemnified Parties") and, at the option of the School District, defend by counsel approved by the School District in its sole discretion; provided that the cost to the Charter School of such School District counsel shall not exceed the rates then generally paid by the School District to its outside counsel handling comparable matters on behalf of the School District; the Indemnified Parties from and against any and all claims, liabilities, demands, costs, charges, liens, expenses, actions, causes of action, lawsuits, administrative proceedings, (including informal proceedings), investigations, audits, demands, assessments, adjustments, settlement payments, deficiencies, penalties, fines, interests, judgments and or executions, (including without limitation reasonable expenses of investigation, legal fees, and court costs) past and present, known, and unknown, suspected or unsuspected, asserted, or unasserted in contract, tort, statutory or common law, whether or not ascertainable at the time of the execution of this Charter which arise out of the willful or negligent act or omission of the Charter Board, the Charter School or any member, officer, director, employee or agent thereof, or out of any misfeasance, malfeasance or nonfeasance of the Charter School, the Charter Board or its or their members, officers, directors, employees or agents.

b. The Charter School, for itself, the Charter Board, and the Charter School's members, officers, directors, employees and agents, hereby irrevocably waives and releases any right of or claim for contribution or in recoupment from the SRC or the School District with respect to any claims, liabilities, demands, etc. covered by subparagraph 2.a above.

c. The Charter School agrees that the indemnification obligation in this Charter shall survive any termination, expiration or revocation of this Charter.

d. The Parties agree to cooperate fully with one another in responding to any allegation, claim, lawsuit, administrative action, investigation, audit or demand arising out of this Charter. This obligation shall survive the termination of this Charter and revocation of the Charter. The Charter School and School District agree to notify one another if either Party receives notice of such a matter by providing a copy of

the relevant document to the other Party.

3. **SCHOOL DISTRICT STATUTORY IMMUNITY:** Any other provision of this Charter to the contrary notwithstanding, the School District, its officers, employees and agents and the members of the School Reform Commission and the Board of Education retain their statutory governmental, official and any other immunity provided pursuant to the laws of the Commonwealth of Pennsylvania, including under 42 Pa. C.S.A. §§ 8501 and 8541 *et seq.*, and do not waive the defenses of governmental and official immunity derived from such laws. The School District does not waive for itself or for its officers, employees, agents and the members of the School Reform Commission and Board of Education any other defenses or immunities available to it or any of them.

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**EXHIBIT F**

**REQUIRED DOCUMENTATION**

The following items shall be attached hereto:

	<i>Document</i>	<i>Description</i>
A	Certified Articles of Incorporation of the Charter School	The Articles of Incorporation of the Charter School, certified as of a date reasonably proximate to the Execution Date by the Secretary of State.
B	Certified Charter Board Resolution(s)	<p>A resolution of the Charter Board, certified by the Charter School's secretary or an assistant secretary as of the Execution Date authorizing the execution and delivery of this Charter and the performance of the transactions contemplated hereby.</p> <p>A duly approved resolution of the Charter Board stating that no members of the Charter Board or their immediate family will have business dealings with the school, and that the Charter Board will comply with the Pennsylvania Public Official and Employee Ethics Act</p>
C	Good Standing or Subsistence Certificate of the Charter School	A good standing certificate for the Charter School dated a date reasonably proximate to the Execution Date issued by the Secretary of State.
D	Certified copy of the By-laws of the Charter School and incumbency of Charter School officers and related documents	A certificate of the secretary of the Charter School dated as of the Execution Date certifying (i) that the copy of the bylaws attached thereto is true, correct and complete; and (ii) that the names and signatures of the officers of the Charter School set forth in the Certificate are correct and authentic and that such persons are authorized to execute and request payments under this Charter.
E	Employment Verification Forms, with background checks and all necessary certifications	Copies of Employment Verification Forms, indicating that a sufficient staff, with complete and appropriate criminal and child abuse records checks, and all necessary certifications as required by this Charter and Applicable Laws, have been hired to serve the actual enrollment of the Charter School.
F	Copy of Signed Lease or Recorded Deed for each Charter School Facility.	A copy of the signed lease or recorded deed for each facility the Charter School shall utilize.
G	Valid Certificate of Occupancy for each Charter School Facility	A valid certificate of occupancy for use as a school for each facility the Charter School shall utilize.
H	Management Contracts (if any)	Any contracts for the provision of management, consulting, or similar services to the Charter School.
I	School Calendar	A calendar showing the dates on which the Charter School is in session, in compliance with School District requirements and Applicable Law.
J	Insurance Certificates	Copies of the insurance documentation required by the Standard Terms and Conditions, attached to the Charter at Exhibit E.



	<i>Document</i>	<i>Description</i>
K	Certified Copy of Admissions Policy	An admissions policy that complies with the Applicable Laws and the Application.
L	Board Meetings; Contact and Financial Interest Disclosure Information	A schedule of all 2005-2006 board meetings and a list of all board members with complete contact information, including email addresses. Charter Board members also shall disclose any direct or indirect financial interest in the Charter School or operations thereof.

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**EXHIBIT G**

**CURRENT CHARTER SCHOOL RECORDS**

Every charter school must maintain the following records ("Current Charter School Records") on-site at the charter school's facility and make such Current Charter School records available for inspection by the School District:

1. Up-to-date Clearances for Every Employee and Volunteer of the Charter School:
  - Child Abuse Clearances
  - Criminal Record Checks by the Pennsylvania State Police or FBI (where required)
2. Student Immunization Records
3. Home Language Survey Results
4. Parent/Student Handbook
5. Statements of Financial Interests for Members of the Charter Board of Trustees (due May 1 of each year)
6. Posted Charter Board of Trustees Meeting Dates, Times and Locations
7. Charter Board of Trustees Meeting Minutes
8. Charter School Bylaws

(M)

(S)

Contract No. 902/F06

School Reform Commission  
Resolution No. SRC-1,  
dated November 9, 2005 and  
Resolution No. SRC-13,  
dated February 15, 2006

**THE SCHOOL DISTRICT OF PHILADELPHIA**

**CHARTER**

**FOR**

**MASTERY CHARTER SCHOOL – THOMAS CAMPUS, INC.**

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**THIS CHARTER** (the "Charter") is made and entered into as of November 9, 2005 (the "Execution Date"), by and between the SCHOOL REFORM COMMISSION (the "SRC") of THE SCHOOL DISTRICT OF PHILADELPHIA (the "School District"), with its principal place of business at 440 North Broad Street, Philadelphia, PA 19130, and Mastery Charter School – Thomas Campus, Inc., a Pennsylvania nonprofit corporation (the "Charter School") acting through and by its Board of Trustees (the "Charter Board"), with its principal place of business at 35 South 4<sup>th</sup> Street, Philadelphia, PA 19106.

**RECITALS**

**WHEREAS**, on December 21, 2001, pursuant to the authority granted under Section 6-691(c) of the Public School Code of 1949, 24 P.S. § 1-101 *et seq.*, as amended (the "School Code"), the Secretary of Education of the Commonwealth of Pennsylvania (the "Secretary") issued a certificate declaring The School District of Philadelphia to be in distress, and the SRC was appointed pursuant to Section 6-696 of the School Code, 24 P.S. § 6-696, as amended by Act 2001, Oct. 30, P.L. 828, No. 83 ("Act 83"); and

**WHEREAS**, pursuant to Section 6-696 of the School Code, the SRC (i) is responsible for the operation, management and educational program of the School District; (ii) is vested with all powers and duties granted to the board of school directors (the "Board of Education") of the School District; and (iii) is authorized, *inter alia*, to grant charters and to enter into agreements for the operation of charter schools in accordance with the Charter School Law, 24 P.S. § 17-1701-A, *et seq.* (the "Charter School Law") and Act 83; and

**WHEREAS**, pursuant to Section 696 of the School Code, the SRC has the power to approve an application to establish and operate a charter school; and

**WHEREAS**, the founding coalition of the Charter School submitted to the SRC an Application to operate the Charter School ("the Application"); and

THE SCHOOL DISTRICT OF PHILADELPHIA

CHARTER

FOR

MASTERY CHARTER SCHOOL – SHOEMAKER CAMPUS, INC.

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**THIS CHARTER** (the “Charter”) is made and entered into as of July 1, 2006 (the “Execution Date”), by and between the SCHOOL REFORM COMMISSION (the “SRC”) of THE SCHOOL DISTRICT OF PHILADELPHIA (the “School District”), with its principal place of business at 440 North Broad Street, Philadelphia, Pennsylvania 19130, and MASTERY CHARTER SCHOOL – SHOEMAKER CAMPUS, INC., a Pennsylvania nonprofit corporation (the “Charter School”) acting through and by its Board of Trustees (the “Charter Board”), with its principal place of business at 35 South 4<sup>th</sup> Street, Philadelphia, PA 19106.

**RECITALS**

**WHEREAS**, on December 21, 2001, pursuant to the authority granted under Section 6-691(c) of the Public School Code of 1949, 24 P.S. § 1-101 *et seq.*, as amended (the “School Code”), the Secretary of Education of the Commonwealth of Pennsylvania (the “Secretary”) issued a certificate declaring The School District of Philadelphia to be in distress, and the SRC was appointed pursuant to Section 6-696 of the School Code, 24 P.S. §6-696, as amended by Act 2001, Oct. 30, P.L. 828, No. 83 (“Act 83”); and

**WHEREAS**, pursuant to Section 6-696 of the School Code, the SRC (i) is responsible for the operation, management and educational program of the School District; (ii) is vested with all powers and duties granted to the board of school directors (the “Board of Education”) of the School District; and (iii) is authorized, *inter alia*, to grant charters and to enter into agreements for the operation of charter schools in accordance with the Charter School Law, 24 P.S. §17-1701-A, *et seq.* (the “Charter School Law”) and Act 83; and

**WHEREAS**, pursuant to Section 696 of the School Code, the SRC has the power to approve an application to establish and operate a charter school; and

**WHEREAS**, the founding coalition of the Charter School submitted to the SRC an Application to operate the Charter School (“the Application”); and

Contract No. 744/F07

School Reform Commission  
Resolution No. A-17  
March 1, 2007

**CHARTER FOR**  
**MASTERY CHARTER SCHOOL – PICKETT CAMPUS, INC.**

**This Charter** (the “Charter”) is made and entered into as of July 1, 2007 (the “Effective Date”), by and between the **THE SCHOOL DISTRICT OF PHILADELPHIA** (the “School District”), with its principal place of business at 440 North Broad Street, Philadelphia, Pennsylvania 19130, and the **MASTERY CHARTER SCHOOL—PICKETT CAMPUS, INC.**, a Pennsylvania nonprofit corporation (the “Charter School”) acting through and by its Board of Trustees (the “Charter Board”), with its principal place of business at 35 South 4<sup>th</sup> Street, Philadelphia, PA 19106. The School District and the Charter School together are referred to as “the Parties” or separately as a “Party”.

**RECITALS**

**WHEREAS**, on December 21, 2001, pursuant to the authority granted under Section 6-691(c) of the Public School Code of 1949, 24 P.S. § 1-101 *et seq.*, as amended (the “School Code”), the Secretary of Education of the Commonwealth of Pennsylvania (the “Secretary”) issued a certificate declaring the School District to be in distress, and the School Reform Commission (“SRC”) was appointed pursuant to Section 6-696 of the School Code, 24 P.S. § 6-696, as amended by Act 2001, Oct. 30, P.L. 828, No. 83 (“Act 83”); and

**WHEREAS**, pursuant to Section 6-696 of the School Code, the SRC (i) is responsible for the operation, management and educational program of the School District; (ii) is vested with all powers and duties granted to the board of school directors (the “Board of Education”) of the School District; and (iii) is authorized, *inter alia*, to grant charters and to enter into agreements for the operation of charter schools in accordance with the Charter School Law, 24 P.S. § 17-1701-A, *et seq.* (the “Charter School Law”) and Act 83; and

**WHEREAS**, pursuant to Section 696 of the School Code, the SRC has the power to approve an application to establish and operate a charter school; and

**WHEREAS**, the founding coalition of the Charter School submitted to the SRC an Application to operate the Charter School (“the Application”); and

**SCHOOL REFORM COMMISSION  
PUBLIC MEETING  
APPROVED RESOLUTIONS – FINAL**

**JUNE 16, 2010**

**Final Agenda Available Online at:**

<http://webgui.phila.k12.pa.us/uploads/9d/1/9d1FEeb73WNRSf6NLEggg/Resolution-List-6.16.10.pdf>

**SRC-37**

**Proposed Charter School Renewal – Mastery Charter High School**

WHEREAS, pursuant to the Charter School Law, 24 Pa. C.S.A. § 17-1701-A, *et. seq.*, the Board of Education of the School District of Philadelphia (the “School District”) granted a charter to the Board of Trustees of MASTERY CHARTER HIGH SCHOOL (the “Charter School”) to operate a charter school from September 1, 2001 through August 31, 2005; and

WHEREAS, pursuant to the Charter School Law, 24 Pa. C.S.A. § 17-1701-A, *et. seq.*, the SRC renewed the Charter School’s Charter for a five-year term from September 1, 2005 through June 30, 2010; and

WHEREAS, the Charter School seeks renewal of its Charter; and

WHEREAS, the SRC has reviewed the Charter School’s request for renewal, and information sought during the renewal process, and has examined school and student performance; now be it  
RESOLVED, that the Charter School must comply with the following conditions (the “Conditions”):

1. The Board of Trustees shall submit to the School District by August 1, 2010 a Conflicts of Interest Policy that complies with the Public Official and Employee Ethics Act and the Pennsylvania Nonprofit Act and that is applicable to trustees, officers, administrators, and relatives of trustees, officers and administrators of the Charter School. The Charter School shall comply with the Conflicts of Interest Policy during the term of the Charter.
2. The Board of Trustees shall submit to the School District by August 1, 2010 an Admissions Policy that complies with the Pennsylvania Charter School Law and shall comply with the Admissions Policy during the term of the Charter.
3. The Board of Trustees shall comply with the requirement that 75% of the Charter School’s professional staff are certified in accordance with the Charter School Law during the term of the Charter.
4. The Board of Trustees shall submit evidence to the School District by August 1, 2010 that 100% of the Charter School’s teachers with primary responsibility for direct instruction in one or more of No Child Left Behind’s core academic subjects demonstrate that they satisfy the definition of a “Highly Qualified Teacher” and shall comply with this requirement during the term of the Charter.
5. The Board of Trustees shall ensure that all employees have required federal and state criminal and child abuse background checks and shall comply with the Charter School’s Employment Policies and Procedures during the term of the Charter.
6. The Board of Trustees shall submit to the School District by August 1, 2010 the curriculum and instruction plan for the Charter School’s Multiple Alternatives Pupil Support Program (“MAPS”), and the Charter School shall provide to the School District the names of the students attending the MAPS program on a monthly basis during the term of the Charter; and be it

FURTHER RESOLVED, that the Charter is RENEWED, subject to the satisfaction of the Conditions set forth above and upon the timely submission of all of the evidence identified above, for a five-year period commencing on July 1, 2010 and ending on June 30, 2015, with current grades and enrollment, effective upon the full execution of the Charter Agreement by the School District and by the President of the Board of Trustees of the Charter School or another member of the Board duly designated by the Board; and be it

FURTHER RESOLVED, that the SRC, pursuant to section 6-696(i)(3) of the Public School Code, partially suspends the corrective action status provision in Section 17-1729-A(a.1) of the Charter School Law that authorizes

the SRC to place specific reasonable conditions in the charter that require the charter school to meet specific student performance targets within reasonable stated periods of time. All other provisions of Section 1729-A(a.1) shall remain in full force and effect; and be it

FURTHER RESOLVED, that during the term of the Charter, the Charter School shall meet reasonable specific student performance targets within reasonable stated time periods as set forth in the Charter between the School District and the Charter School; and be it

FURTHER RESOLVED, that the Charter School is approved for a total enrollment of 600 students in grades 7-12; and be it

FURTHER RESOLVED, that any requests for amendment to the Charter not addressed in this resolution are deemed denied.

### **SRC-38**

#### **Proposed Charter School Renewal – Mastery Charter School – Thomas Campus**

WHEREAS, pursuant to the Charter School Law, 24 Pa. C.S.A. § 17-1701-A, *et. seq.*, the School Reform Commission (the “SRC”) of the School District of Philadelphia (the “School District”) granted a charter to the Board of Trustees of MASTERY CHARTER SCHOOL – THOMAS CAMPUS, INC. (the “Charter School”) to operate a charter school from September 1, 2005 through June 30, 2010; and

WHEREAS, the Charter School seeks renewal of its Charter; and

WHEREAS, the SRC has reviewed the Charter School's request for renewal, and information sought during the renewal process, and has examined school and student performance; now be it

RESOLVED, that the Charter School must comply with the following conditions (the “Conditions”):

1. The Board of Trustees shall submit to the School District by August 1, 2010 a Conflicts of Interest Policy that complies with the Public Official and Employee Ethics Act and the Pennsylvania Nonprofit Act and that is applicable to trustees, officers, administrators, and relatives of trustees, officers and administrators of the Charter School. The Charter School shall comply with the Conflicts of Interest Policy during the term of the Charter.
2. The Board of Trustees shall submit to the School District by August 1, 2010 an Admissions Policy that complies with the Pennsylvania Charter School Law and shall comply with the Admissions Policy during the term of the Charter.
3. The Board of Trustees shall comply with the requirement that 75% of the Charter School's professional staff are certified in accordance with the Charter School Law during the term of the Charter.
4. The Board of Trustees shall submit evidence to the School District by August 1, 2010 that 100% of the Charter School's teachers with primary responsibility for direct instruction in one or more of No Child Left Behind's core academic subjects demonstrate that they satisfy the definition of a “Highly Qualified Teacher” and shall comply with this requirement during the term of the Charter.
5. The Board of Trustees shall ensure that all employees have required federal and state criminal and child abuse background checks and shall comply with the Charter School's Employment Policies and Procedures during the term of the Charter.
6. The Board of Trustees shall submit to the School District by August 1, 2010 the curriculum and instruction plan for the Charter School's Multiple Alternatives Pupil Support Program (“MAPS”), and the Charter School shall provide to the School District the names of the students attending the MAPS program on a monthly basis during the term of the Charter; and be it

FURTHER RESOLVED, that the Charter is RENEWED, subject to the satisfaction of the Conditions set forth above and upon the timely submission of all of the evidence identified above, for a five-year period commencing on July 1, 2010 and ending on June 30, 2015, with current grades and enrollment, effective upon the full execution of

the Charter Agreement by the School District and by the President of the Board of Trustees of the Charter School or another member of the Board duly designated by the Board; and be it

FURTHER RESOLVED, that the SRC, pursuant to section 6-696(i)(3) of the Public School Code, partially suspends the corrective action status provision in Section 17-1729-A(a.1) of the Charter School Law that authorizes the SRC to place specific reasonable conditions in the charter that require the charter school to meet specific student performance targets within reasonable stated periods of time. All other provisions of Section 1729-A(a.1) shall remain in full force and effect; and be it

FURTHER RESOLVED, that during the term of the Charter, the Charter School shall meet reasonable specific student performance targets within reasonable stated time periods as set forth in the Charter between the School District and the Charter School; and be it

FURTHER RESOLVED, that the SRC, pursuant to section 6-696(i)(3) of the Public School Code, suspends Section 17-1723-A(a) of the Charter School Law, which states: "all resident children in this Commonwealth qualify for admission to a charter school" for this Charter School only, as follows: the Charter School will have admissions preferences for students who reside in its attendance zone (to be determined by the School District and attached to the Charter). If enrollment slots are still available after admitting all applicants from the attendance zone, the Charter School shall fill the remaining slots on a random basis in accordance with Section 17-1723-A. All other provisions of Section 17-1723-A and the Public School Code shall remain in force and the Charter School may not exclude children on any basis other than that set forth in this paragraph; and be it

FURTHER RESOLVED, that the Charter School is approved for a total enrollment of 550 students in grades 7-12; and be it

FURTHER RESOLVED, that any requests for amendment to the Charter not addressed in this resolution are deemed denied and be it

FURTHER RESOLVED, that the Lease ("Lease") between the School District and the Charter School for the leasing of Thomas Middle School, 927 Johnston Street, Philadelphia, PA 19148, is hereby renewed under the same terms and conditions as in the current Lease; and the SRC authorizes the School District, by and through its Chief Executive Officer or her designee, to enter into any and all documents necessary to effect the renewal of the Lease.

#### **SRC-46**

##### **Proposed Renaissance Charter School – Mastery Charter School Harrity Elementary, Inc.**

WHEREAS, pursuant to the Renaissance Schools Initiative Policy adopted by the School Reform Commission ("SRC"), the School District of Philadelphia ("School District") conducted a two-stage solicitation process to qualify and select teams ("Turnaround Teams") to turnaround School District schools identified as Renaissance Schools; and

WHEREAS, pursuant to the Public School Code, the Charter School Law and the Renaissance Schools Initiative Policy, and after a review of the responses of Turnaround Teams to the Request for Proposals – Lead Applicants, RFP No. 260, Renaissance Schools Initiative Year 1 ("RFP 260) and the recommendations of Renaissance School Advisory Councils ("SAC's"), the SRC approved the matching of certain Turnaround Teams with certain Renaissance Schools by Resolution No. SRC-26, dated May 12, 2010; and

WHEREAS, Mastery Charter High School, Inc. submitted a Renaissance Charter Schools Charter Application pursuant to RFP 260 for Master Charter School Harrity Elementary, Inc. to operate a charter school at William Harrity Elementary School; and

WHEREAS, the SRC, having reviewed the Renaissance Schools Charter Application and related materials, is now prepared to grant a charter for the Charter School; NOW BE IT



RESOLVED, That the School Reform Commission grants a charter to **Mastery Charter School Harrity Elementary** ("Charter School") to operate a public charter school at William Harrity Elementary School for a five-year period beginning July 1, 2010 and ending June 30, 2015, provided that during the term of the charter the Charter School has agreed in its response to RFP 260 and in the Renaissance Schools Charter Application to the following terms and conditions, which shall be incorporated in the charter:

- A SAC for the school consisting of parents and community members shall exist during the term of the charter, and the Charter School shall engage the SAC in advising the charter school in decision-making at the school.
- The SAC shall report annually to the Superintendent of the School District on the performance of the Charter School.
- The Charter School shall be required to achieve a rank of five (5) on the School District's School Performance Index ("SPI") by the end of the fourth year of the term of the charter, and annually during the term of the charter, the Charter School must improve its SPI rank to ensure that progress is being made.
- If the Charter School does not make progress on improving its SPI rank for two (2) consecutive years or if the required ranking is not achieved by the end of the term of the charter, the SRC may vote to revoke or non-renew the charter.
- During the term of the charter, the Charter School shall meet annual School District School Report Card performance targets.
- During the term of the charter, the Charter School shall operate the school as a neighborhood school and meet student enrollment and retention targets, including: (i) percent of neighborhood students attending the school, (ii) percent of students retained from year to year; and (iii) percent of students who transfer out of the school. If these targets are not met for two (2) consecutive years during the term of the charter, the SRC may vote to revoke or non-renew the charter.
- During the term of the charter, the Charter School shall meet certain climate and operational metrics for per pupil rates of violent incidents and shall comply with regulations related to special education and English Language Learners, including: (i) rate of violent incidents, (ii) not being determined to be a Persistently Dangerous School by the Pennsylvania Department of Education, (iii) compliance with special education re-evaluations and IEP timeline, and (iv) the provision of appropriate services and supports for students with Limited English Proficiency (as established by the School District). If these targets are not met for two (2) consecutive years during the term of the charter, the SRC may vote to revoke or non-renew the charter; and be it

FURTHER RESOLVED, that the Charter School is approved for grades K-8 and a total maximum enrollment of eight hundred fifty (850); and be it

FURTHER RESOLVED, that the charter approved by this Resolution shall issue forthwith on July 1, 2010. The charter awarded herein will not take effect until the charter agreement has been signed by the School District and the President of the Board of Trustees of the Charter School or another member of the Board duly designated by the Board of Trustees.

#### **SRC-47**

##### **Proposed Renaissance Charter School – Mastery Charter School Mann Elementary, Inc.**

WHEREAS, pursuant to the Renaissance Schools Initiative Policy adopted by the School Reform Commission ("SRC"), the School District of Philadelphia ("School District") conducted a two-stage solicitation process to qualify and select teams ("Turnaround Teams") to turnaround School District schools identified as Renaissance Schools; and

WHEREAS, pursuant to the Public School Code, the Charter School Law and the Renaissance Schools Initiative Policy, and after a review of the responses of Turnaround Teams to the Request for Proposals – Lead Applicants, RFP No. 260, Renaissance Schools Initiative Year 1 ("RFP 260") and the recommendations of Renaissance School Advisory Councils ("SAC's"), the SRC approved the matching of certain Turnaround Teams with certain Renaissance Schools by Resolution No. SRC-26, dated May 12, 2010; and

WHEREAS, Mastery Charter High School, Inc. submitted a Renaissance Charter Schools Charter Application pursuant to RFP 260 for Master Charter School Mann Elementary, Inc. to operate a charter school at the William Mann Elementary School; and

WHEREAS, the SRC, having reviewed the Renaissance Schools Charter Application and related materials, is now prepared to grant a charter for the Charter School; NOW BE IT

RESOLVED, That the School Reform Commission grants a charter to **Mastery Charter School Mann Elementary** ("Charter School") to operate a public charter school at the Williams Mann Elementary School for a five-year period beginning July 1, 2010 and ending June 30, 2015, provided that during the term of the charter the Charter School has agreed in its response to RFP 260 and in the Renaissance Schools Charter Application to the following terms and conditions, which shall be incorporated in the charter:

- A SAC for the school consisting of parents and community members shall exist during the term of the charter, and the Charter School shall engage the SAC in advising the charter school in decision-making at the school.
- The SAC shall report annually to the Superintendent of the School District on the performance of the Charter School.
- The Charter School shall be required to achieve a rank of five (5) on the School District's School Performance Index ("SPI") by the end of the fourth year of the term of the charter, and annually during the term of the charter, the Charter School must improve its SPI rank to ensure that progress is being made.
- If the Charter School does not make progress on improving its SPI rank for two (2) consecutive years or if the required ranking is not achieved by the end of the term of the charter, the SRC may vote to revoke or non-renew the charter.
- During the term of the charter, the Charter School shall meet annual School District School Report Card performance targets.
- During the term of the charter, the Charter School shall operate the school as a neighborhood school and meet student enrollment and retention targets, including: (i) percent of neighborhood students attending the school, (ii) percent of students retained from year to year; and (iii) percent of students who transfer out of the school. If these targets are not met for two (2) consecutive years during the term of the charter, the SRC may vote to revoke or non-renew the charter.
- During the term of the charter, the Charter School shall meet certain climate and operational metrics for per pupil rates of violent incidents and shall comply with regulations related to special education and English Language Learners, including: (i) rate of violent incidents, (ii) not being determined to be a Persistently Dangerous School by the Pennsylvania Department of Education, (iii) compliance with special education re-evaluations and IEP timeline, and (iv) the provision of appropriate services and supports for students with Limited English Proficiency (as established by the School District). If these targets are not met for two (2) consecutive years during the term of the charter, the SRC may vote to revoke or non-renew the charter; and be it

FURTHER RESOLVED, that the Charter School is approved for grades K-5 and a total maximum enrollment of five hundred twenty-five (525) students; and be it

FURTHER RESOLVED, that the charter approved by this Resolution shall issue forthwith on July 1, 2010. The charter awarded herein will not take effect until the charter agreement has been signed by the School District and the President of the Board of Trustees of the Charter School or another member of the Board duly designated by the Board of Trustees.

#### **SRC-48**

##### **Proposed Renaissance Charter School – Mastery Charter School Smedley Elementary, Inc.**

WHEREAS, pursuant to the Renaissance Schools Initiative Policy adopted by the School Reform Commission ("SRC"), the School District of Philadelphia ("School District") conducted a two-stage solicitation process to qualify and select teams ("Turnaround Teams") to turnaround School District schools identified as Renaissance Schools; and

WHEREAS, pursuant to the Public School Code, the Charter School Law and the Renaissance Schools Initiative Policy, and after a review of the responses of Turnaround Teams to the Request for Proposals – Lead Applicants, RFP No. 260, Renaissance Schools Initiative Year 1 (“RFP 260”) and the recommendations of Renaissance School Advisory Councils (“SAC’s”), the SRC approved the matching of certain Turnaround Teams with certain Renaissance Schools by Resolution No. SRC-26, dated May 12, 2010; and

WHEREAS, Mastery Charter High School, Inc. submitted a Renaissance Charter Schools Charter Application pursuant to RFP 260 for Master Charter School Smedley Elementary, Inc. to operate a charter school at the Franklin Smedley Elementary School; and

WHEREAS, the SRC, having reviewed the Renaissance Schools Charter Application and related materials, is now prepared to grant a charter for the Charter School; NOW BE IT

RESOLVED, That the School Reform Commission grants a charter to **Mastery Charter School Smedley Elementary** (“Charter School”) to operate a public charter school at the Smedley Elementary School for a five-year period beginning July 1, 2010 and ending June 30, 2015, provided that during the term of the charter the Charter School has agreed in its response to RFP 260 and in the Renaissance Schools Charter Application to the following terms and conditions, which shall be incorporated in the charter:

- A SAC for the school consisting of parents and community members shall exist during the term of the charter, and the Charter School shall engage the SAC in advising the charter school in decision-making at the school.
- The SAC shall report annually to the Superintendent of the School District on the performance of the Charter School.
- The Charter School shall be required to achieve a rank of five (5) on the School District’s School Performance Index (“SPI”) by the end of the fourth year of the term of the charter, and annually during the term of the charter, the Charter School must improve its SPI rank to ensure that progress is being made.
- If the Charter School does not make progress on improving its SPI rank for two (2) consecutive years or if the required ranking is not achieved by the end of the term of the charter, the SRC may vote to revoke or non-renew the charter.
- During the term of the charter, the Charter School shall meet annual School District School Report Card performance targets.
- During the term of the charter, the Charter School shall operate the school as a neighborhood school and meet student enrollment and retention targets, including: (i) percent of neighborhood students attending the school, (ii) percent of students retained from year to year; and (iii) percent of students who transfer out of the school. If these targets are not met for two (2) consecutive years during the term of the charter, the SRC may vote to revoke or non-renew the charter.
- During the term of the charter, the Charter School shall meet certain climate and operational metrics for per pupil rates of violent incidents and shall comply with regulations related to special education and English Language Learners, including: (i) rate of violent incidents, (ii) not being determined to be a Persistently Dangerous School by the Pennsylvania Department of Education, (iii) compliance with special education re-evaluations and IEP timeline, and (iv) the provision of appropriate services and supports for students with Limited English Proficiency (as established by the School District). If these targets are not met for two (2) consecutive years during the term of the charter, the SRC may vote to revoke or non-renew the charter; and be it

FURTHER RESOLVED, that the Charter School is approved for grades K-5 and a total maximum enrollment of six hundred twenty-five (625) students; and be it

FURTHER RESOLVED, that the charter approved by this Resolution shall issue forthwith on July 1, 2010. The charter awarded herein will not take effect until the charter agreement has been signed by the School District and the President of the Board of Trustees of the Charter School or another member of the Board duly designated by the Board of Trustees.



**State of New Jersey**  
DEPARTMENT OF EDUCATION  
PO Box 500  
TRENTON, NJ 08625-0500

JON S. CORZINE  
*Governor*

LUCILLE E. DAVY  
*Commissioner*

January 11, 2010

Mr. Scott Gordon  
Excellence Charter School  
5700 Wayne Avenue  
Philadelphia, PA 19144

Dear Mr. Gordon:

It is my honor to inform you that the application for Excellence Charter School, serving the students of Camden, is approved under the fast track application process. The fast track process enabled the founders to apply under an expedited timeline for approval. This process allowed for a full period of review by the district of residence. The district provided comments which were taken into consideration by the department.

The charter school's final approval is contingent upon receipt of outstanding documentation not included in your application, successful participation in the preparedness process and compliance with applicable state and federal regulations. Once the preparedness process is successfully completed and all documentation is approved, your charter will be granted in accordance with proposed *N.J.A.C. 6A:11-2.1(i - l)*.

I want to stress the following strengths, all of which contributed to the approval of your application:

Implementation Plan:

- A mission statement which indicates that all students will learn the academic and personal skills they need to succeed in higher education, to compete in a global economy and to pursue their dreams;
- A standards based and skills focused curriculum; and
- An extended school day and year.

Financial Plan:

- Program is supported by the financial statements;
- Budget narrative supports the budget summary; and
- Cash flow tied to the budget summary providing an adequate fiscal plan.

[www.nj.gov/education](http://www.nj.gov/education)

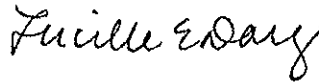
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Mr. Scott Gordon  
Page 2  
January 11, 2010

The charter schools initiative in New Jersey represents an exciting opportunity for parents, teachers and others to use their collective creativity in designing new and innovative ways of helping children to reach high levels of academic achievement. I commend you for your interest and commitment to this important movement, and look forward to working with you as you serve the public school students in the state.

If you have any questions, please contact Kenneth Figgs, manager, Office of Charter Schools, at 609-292-5850.

Sincerely,



Lucille E. Davy  
Commissioner

LED/WS/KF/DB/s:2009expeditedapplicationprocess/excellence-masteryapproval12-09

c: Governor Jon Corzine  
Senior Staff  
Department Directors  
Peggy Nicolosi  
Bessie LeFra Young



State of New Jersey  
DEPARTMENT OF EDUCATION  
PO Box 500  
TRENTON, NJ 08625-0500

CHRIS CHRISTIE  
*Governor*

KIM GUADAGNO  
*Lt. Governor*

BRET SCHUNDLER  
*Commissioner*

April 30, 2010

Scott Gordon, Lead Organizer  
Excellence Charter School  
c/o Mastery Charter Schools  
5700 Wayne Avenue  
Philadelphia, PA 19144

Dear Mr. Gordon:

I receive your correspondence which was addressed to Commissioner Bret Schundler regarding your request for a one year planning period for the Excellence Charter School. This one year planning period would allow the school to open in the fall of 2011 providing all requirements are satisfactorily completed by June 30, 2012.

Please be advised that your request is approved. Please contact Colleen Eskow or Donna Best from my office if you need assistance and to update them on your progress during this planning period.

If you have any further questions, please contact me at 609-292-5850.

Sincerely,

Kenneth A. Figgs, Manager  
Office of Charter Schools

KF/DB/SA\referrals 2010\mastery-gordon referral4-10.doc

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June 23, 2010

The Honorable Arne Duncan  
Secretary of Education  
U.S. Department of Education  
400 Maryland Avenue, SW  
Washington, DC 20202

Dear Secretary Duncan,

This letter is to verify that each Mastery Charter School in Pennsylvania is a separate non-profit corporation, established and recognized as a separate school under state law in Pennsylvania. Attached is documentation on the four current Mastery Schools from the Pennsylvania Department of Education's EdNA (Education Names and Addresses) database. This is used to provide official, public information about educational entities that the department oversees, including all charter schools.

Mastery Charter High School (PDE Administrative Unit Number 126510002) is serving as the lead LEA in the Charter Schools Program Expansion grant application and has a signed management agreement with each of the other three currently operating Mastery Charter Schools for consulting and other support services. The three new Mastery campuses opening in August 2010 will each receive their own AUN from the State upon opening and will each be independent legal entities. Like all other existing Mastery Schools, they will have a signed management agreement in place to receive support services from Mastery Charter High School.

In New Jersey, when each Mastery Charter School opens, they will also have its own unique school number granted by the New Jersey Department of Education and will be treated as separate legal entities with a signed management agreement with Mastery Charter High School in Philadelphia.

Each Mastery Charter School has its own physical facility, staff, and student body. Day to day operations are carried out by separate administrators each reporting directly to their own board. The CEO of Mastery Charter High School reports directly to the board of that entity and serves as an agent for the board under the management agreements signed between each Mastery School and Mastery Charter High School.

If you have any questions regarding Pennsylvania or New Jersey Charter School Law or the regulations governing Mastery Charter School entities or operations in either state, please feel free to contact me directly.

Thank you for your consideration.

Respectfully submitted,



Robert O'Donnell

**Mastery Charter School Locations**  
**High Need School Locations and Autonomies Documentation**  
**2010-11**  
**Section 4d-f**

Each Mastery Charter School Campus has its own administration, faculty, student body, facility and governing board representatives. All campuses have signed a management agreement with Mastery Charter High School to serve as the Network lead and to provide consulting services including: teacher recruitment, orientation, professional development, and support; general human resources and finance functions; facility planning and improvements, common data systems management, instructional benchmark assessments, etc.

**Low Income Percentages at each school currently operated by Mastery or scheduled to open in FY 11 are listed below based on eligibility for Free and Reduced Price Lunch.**

MCHS (2001)	Thomas (2005)	Shoemaker (2006)	Pickett (2007)	Mann (2010)	Harrity (2010)	Smedley (2010)
69.75%	76.00%	93.00%	86.40%	84.20%	90.20%	94.00%

Mastery Charter High School  
 35 South 4<sup>th</sup> Street  
 Philadelphia, PA 19106  
 215-922-1902  
 Principal: Steve Kollar  
**Low Income: 69.75%**

Mastery Charter School – Pickett Campus  
 5700 Wayne Avenue  
 Philadelphia, PA 19144  
 215-866-9000  
 Principal: Kelly Seaton  
**Low Income: 86.40%**

Mastery Charter School – Thomas Campus  
 927 Johnston Street  
 Philadelphia, PA 19148  
 267-236-0036  
 Principal: Matt Troha  
**Low Income: 76.00%**

Mastery Charter School – Mann Campus (new)  
 5376 W. Berks Avenue  
 Philadelphia, PA 19131  
 Principal: Stan Bobowski  
**Low Income: 84.20%**

Mastery Charter School – Shoemaker Campus  
 5301 Media Street  
 Philadelphia, PA 19131  
 267-296-7111  
 Principal: Sharif El Mekki  
**Low Income: 93.00%**

Mastery Charter School – Harrity Campus (new)  
 5601 Christian Street  
 Philadelphia, PA 19143  
 Principal: Deborah Durso  
**Low Income: 90.20%**

Mastery Charter School – Smedley Campus  
 (new)  
 1790 Bridge Street  
 Philadelphia, PA 19124  
 Principal: Brian McLaughlin  
**Low Income: 94.00%**



# Project Narrative

## Section 5 - Other Attachments: Student Academic Achievement

Attachment 1:

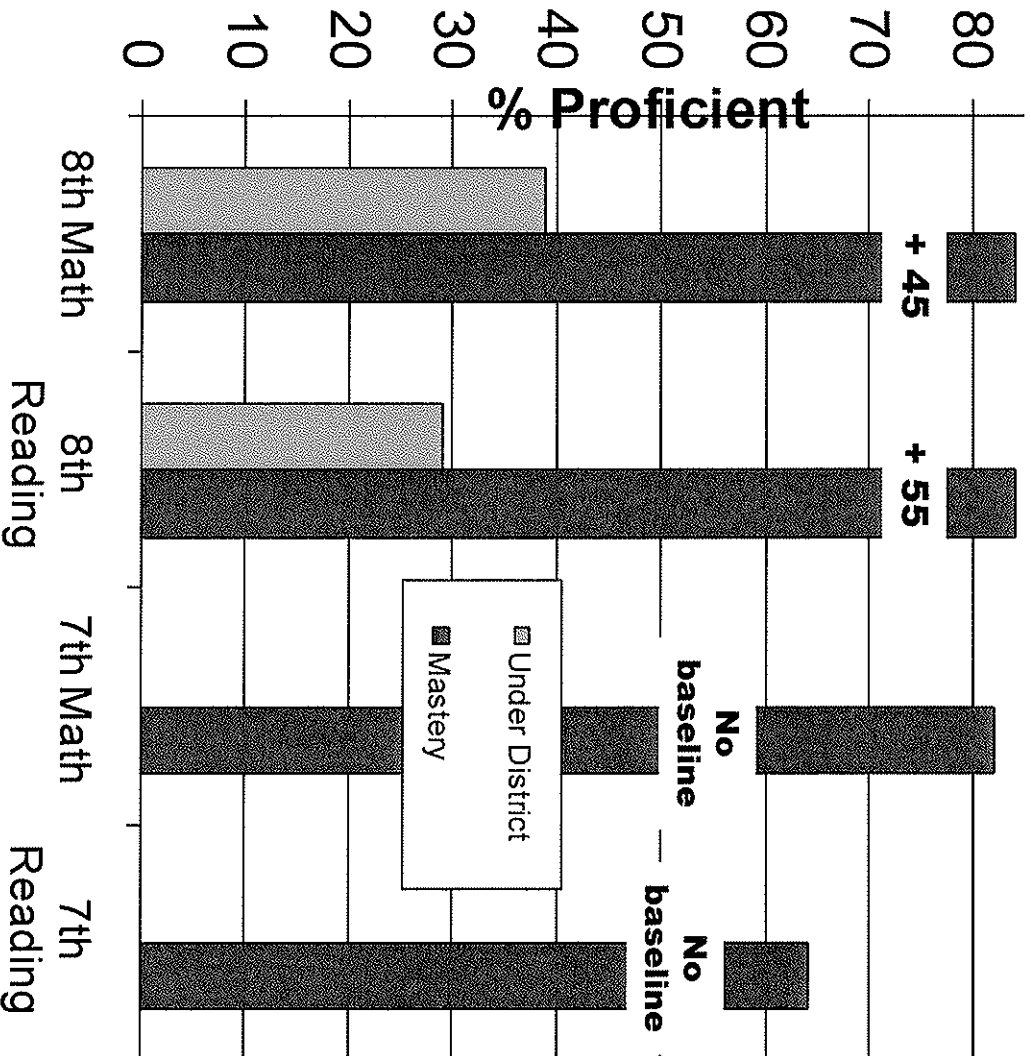
Title: **Mastery Student Academic Achievement** Pages: **10** Uploaded File: **Academics full upload MCS.pdf**

## Section 5: Student Academic Achievement

1. School-level achievement highlights pages 2-4
  - a. Results on PSSA
  - b. Violent Incidents
  - c. Attendance
  - d. Student Turnover
2. Mastery School PSSA data by grade level 2004 to present pages 6-7
3. Additional Academic Goal Data on Current Mastery Schools pages 8-10
  - a. 4Sight Predictive test results
  - b. PSSA Growth by grade level and campus
  - c. PSSA level breakdowns by campus
  - d. Longitudinal Grade level progress and reading level growth

# Thomas Turnaround (fall 2005)

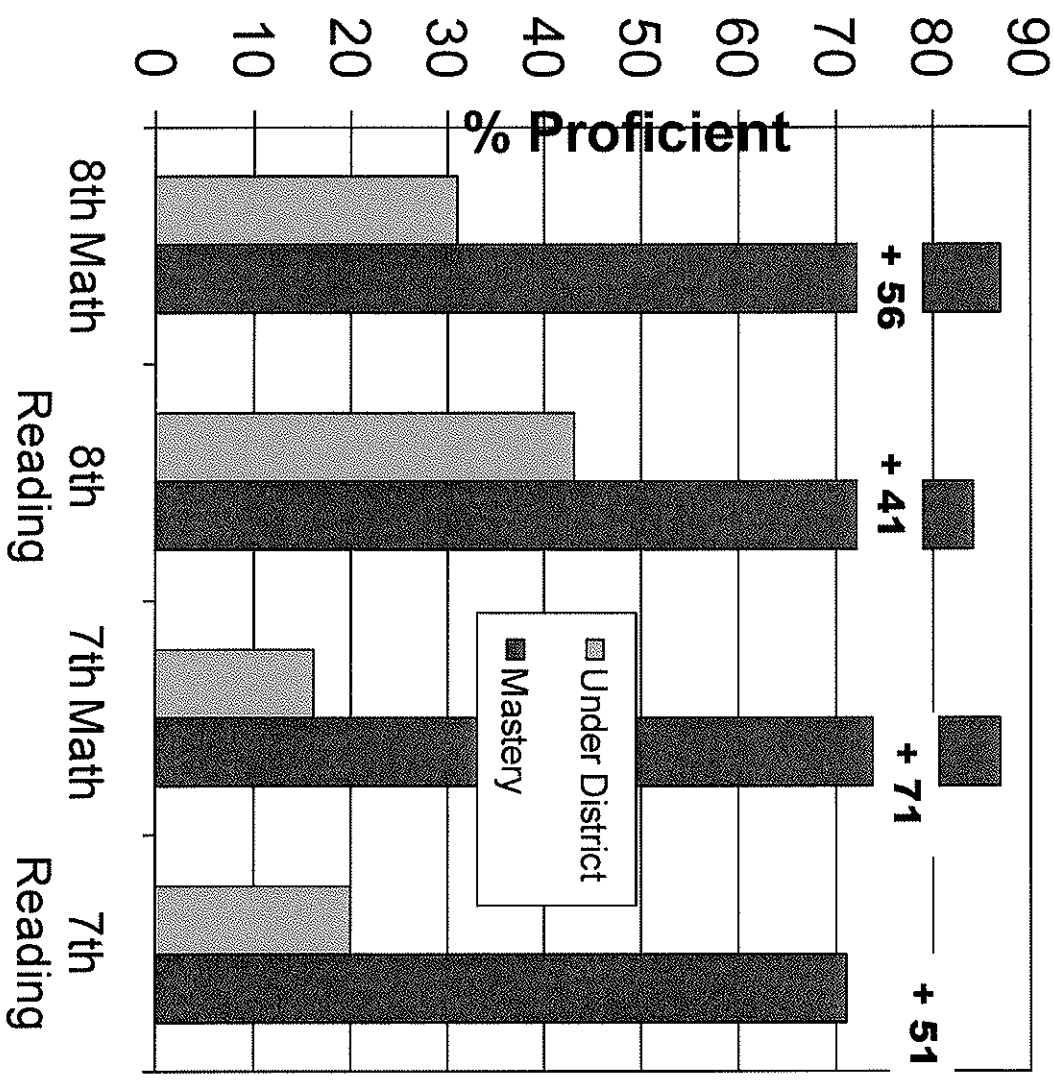
## Thomas 09 Results



	<u>2004-5</u>	<u>2008-9</u>
	District	Mastery
School Police	1	0
# of "Incidents"	No	3 per 100 students
Attendance	90%	94%
Student Turnover	14%	10%

# Shoemaker Turnaround (fall 2006)

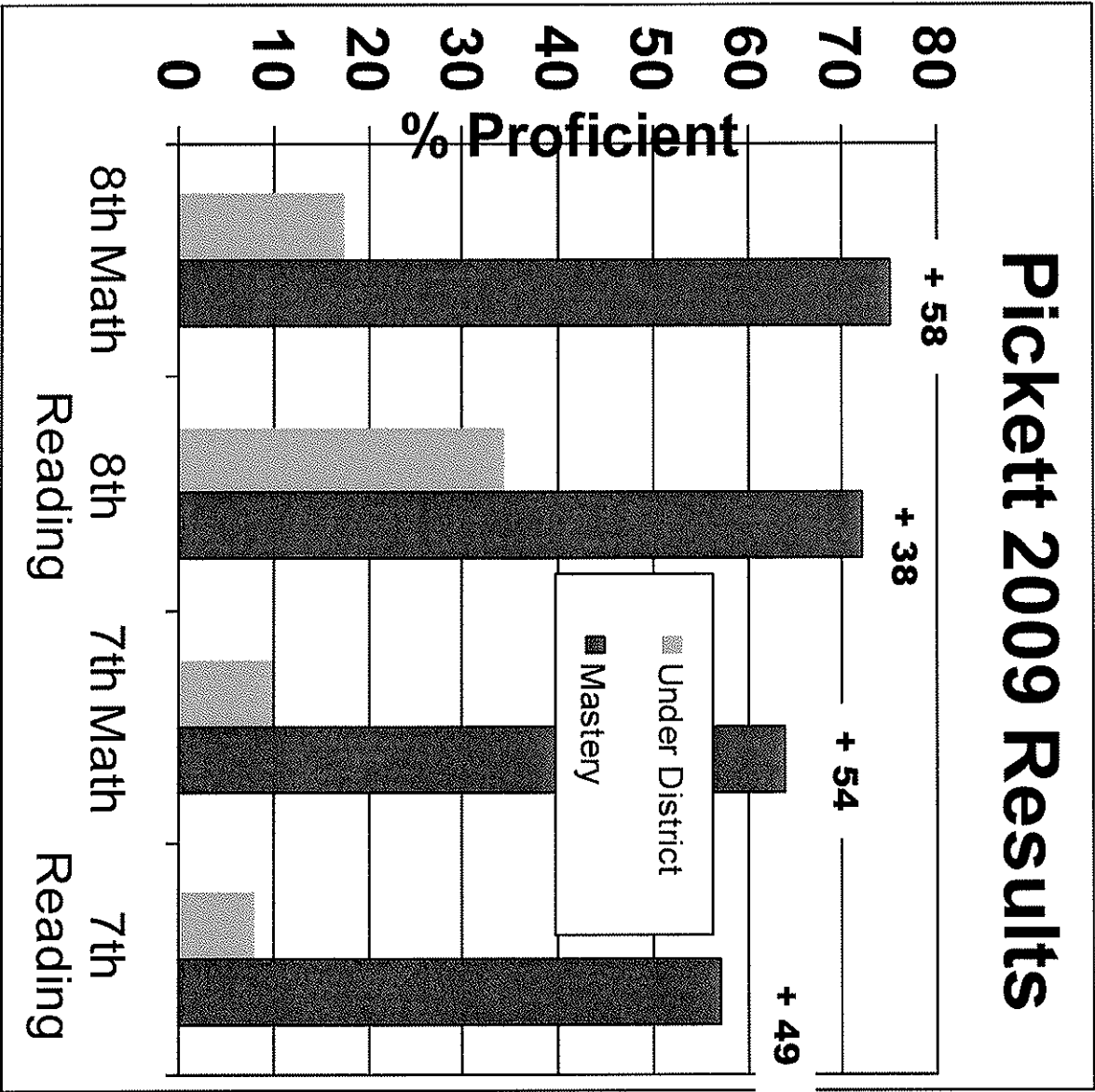
## Shoemaker 09 Results



	<u>2004-5</u> <u>District</u>	<u>2008-9</u> <u>Mastery</u>
School Police	2	0
# of "Incidents"	18 per 100 students	3 per 100 students
Attendance	82%	94%
Student Turnover	35%	7%

# Pickett Turnaround (fall 2007)

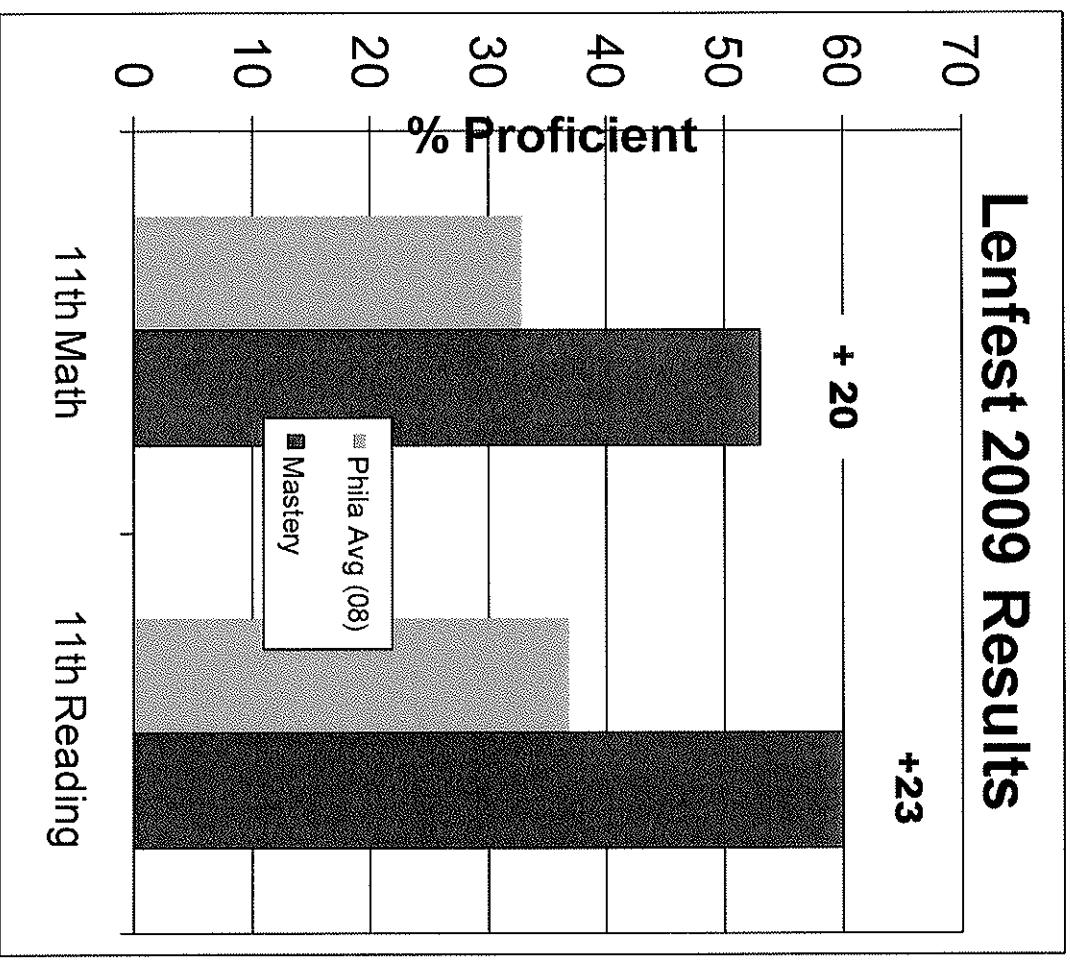
## Pickett 2009 Results



	<u>2004-5</u>	<u>2008-9</u>
School Police	District 2	Mastery 0
# of "Incidents"	14 per 100 students	2 per 100 students
Attendance	86%	94%
Student Turnover	21%	13%

# Lenfest Campus Results

- **Lenfest Campus (high school)**
- **95% of Graduates accepted to College**
- **65% of Graduates → 4 yr college**
- **\$1.5 million in scholarships**



Mastery Charter School  
Annual Student Achievement DATA

Yellow is Pre-Conversion Data

\*\*2010 data is preliminary as final results will be released in August

<b>LENFEST</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
11th PSSA Math (% prof/adv)	36	35	37	35	50	53	59
11th PSSA Reading (% prof/adv)	43	44	46	45	51	60	54
11th PSSA Writing (%prof/adv)			92	97	96	85	93
8th PSSA Math (% prof/adv)							83
8th PSSA Reading (% prof/adv)							85
8th PSSA Writing (%prof/adv)							91
7th PSSA Math (% prof/adv)						86	71
7th PSSA Reading (%prof/adv)						67	55
Math Total (%prof/adv)					50	69	70
Reading Total (%prof/adv)					51	63	64
Made AYP	Yes	No	Yes	No	Yes	Yes	
Transfer & Non reenroll Rate (%)			11.8	10.2	9.7	7.7	
Attendance (%)	92	93	93	94	93	94	
Parent Satisfaction Data(1-10 scale with 10 being satisfied)				8.6	8.7	8.7	
<b>THOMAS</b>		<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
11th PSSA Math (% prof/adv)						59	56
11th PSSA Reading (% prof/adv)						57	65
11th PSSA Writing (%prof/adv)						94	92
8th PSSA Math (% prof/adv)		39	44	62	67	84	85
8th PSSA Reading (% prof/adv)		29	39	62	68	84	87
8th PSSA Writing (%prof/adv)			72	90	76	77	78
7th PSSA Math (% prof/adv)		N/A	49	57	65	82	88
7th PSSA Reading (%prof/adv)		N/A	43	49	58	64	64
Math Total (%prof/adv)		39	44	59	66	72	74
Reading Total (%prof/adv)		29	39	55	64	66	71
Made AYP		No CA2	Yes	Yes	Yes	Yes	
Transfer & Non reenroll Rate (%)			11.9	12.7	12	11.2	
Attendance (%)		91	94	94	94	94	
Parent Satisfaction Data(1-10 scale with 10 being satisfied)				8.9	8.9	8.8	

Mastery Charter School  
Annual Student Achievement DATA

<b>SHOEMAKER</b>			<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
11th PSSA Math (% prof/adv)							60
11th PSSA Reading (% prof/adv)							57
11th PSSA Writing (%prof/adv)							93
8th PSSA Math (% prof/adv)			31		76	87	82
8th PSSA Reading (% prof/adv)			43	59	79	84	84
8th PSSA Writing (%prof/adv)			41	83	84	83	87
7th PSSA Math (% prof/adv)			16	34	81	87	87
7th PSSA Reading (%prof/adv)			20	41	66	71	64
Math Total (%prof/adv)			31	48	79	87	77
Reading Total (%prof/adv)			43	49	73	78	69
Made AYP			No	Yes	Yes	Yes	
Transfer & Non reenroll Rate (%)			36	27	14	8.6	
Attendance (%)			82	90	93	95	
Parent Satisfaction Data(1-10 scale with 10 being satisfied)				8.9	8	8.5	

<b>PICKETT</b>				<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
8th PSSA Math (% prof/adv)				17	42	75	65
8th PSSA Reading (% prof/adv)				34	47	72	71
8th PSSA Writing (%prof/adv)				45	59	73	74
7th PSSA Math (% prof/adv)				10	51	64	79
7th PSSA Reading (%prof/adv)				8	53	57	56
Math Total (%prof/adv)				14	48	69	72
Reading Total (%prof/adv)				22	51	64	63
Made AYP				No	No	Yes	
Transfer & Non reenroll Rate (%)				21	14	15.5	
Attendance (%)				85.5	93	94	
Parent Satisfaction Data(1-10 scale with 10 being satisfied)					8.8	8.9	

*\*\* Special Education Subgroup performance (22% of population) is reason for missed AYP in 2007 and 2008 despite dramatic overall school performance -- being addressed*



## 4Sight Goal Hit Rate

Key: red= missed goal, yellow=hit progress metric, green=hit goal

READING	9R	10R
Result	Goal	Result
Goal		Goal
Lentest	55	58
Thomas	52	58
Shoemaker	63	70
Pickett	49	58

Math	9M	10M
Result	Goal	Result
Goal		Goal
Lentest	51	58
Thomas	51	58
Shoemaker	83	80
Pickett	56	58

## GROWTH DATA

## PSSA Growth, Maintain, Slide

	7R	8R	11R	7M	8M	11M
L	55(+2)	85 (no hist)	54(+5)	71(+5)	83 (no hist)	59(+5)
T	64(0)	87(+3)	65(+8)	88(+6)	85(+1)	59(+3)
S	64(+7)	84(0)	57 (no hist)	87(0)	92(+5)	60 (no hist)
P	56(+7)	71(+7)		79(+15)	65(+10)	

	8W	11W	8S	11S
L	91	93(+8)	45	6(+1)
T	78(+1)	92(+2)	24(+3)	10(+7)
S	87(+4)	93(no hist)	56(+10)	9(no hist)
P	74(+1)		30(+5)	

## 4Sight-Final Growth, Maintain, Slide (comparing 3rd test in '09 to 4th test in '10)

	9R	10R	9M	10M
L	55(+11)	47(+16)	57(+13)	44(+18)
T	62(+6)	65(+9)	51(+4)	78(+20)
S	63(+3)	48(+18)	83(+4)	80(+5)
P	49(+3)	44	56(+3)	82

## Longitudinal View of Student PSSA Progress

Class of 2014 (current 8th)	7th M ('09)	8th M ('10)	7th R ('09)	8th R ('10)
L	86	83	67	85
T	82	85	64	87
S	87	82	71	84
P	64	65	57	71

Class of 2011 (current 11th)	7th M ('06)	8th M ('07)	11th M ('10)	7th R ('06)	8th R ('07)	11th R ('10)
L	49	62	56	43	62	65
T	16	63	80	20	59	67
S						

# ADD'L DATA

4<sup>th</sup> Sight-PSSA Comparison

Lentest: 4 <sup>th</sup> Sight to PSSA Comparison				
Lentest	3 <sup>rd</sup> 4 <sup>th</sup> Sight M	M PSSA	3 <sup>rd</sup> 4 <sup>th</sup> Sight R	R PSSA
7 <sup>th</sup>	51	71		55
8 <sup>th</sup>	71	83		85
11 <sup>th</sup>	83	59		73
				54

Thomas: 4<sup>th</sup> Sight to PSSA Comparison

Thomas: 4 <sup>th</sup> Sight to PSSA Comparison				
Lentest	3 <sup>rd</sup> 4 <sup>th</sup> Sight M	M PSSA	3 <sup>rd</sup> 4 <sup>th</sup> Sight R	R PSSA
7 <sup>th</sup>		83	88	69
8 <sup>th</sup>		67	85	72
11 <sup>th</sup>		70	56	67
				84

Shoemaker: 4<sup>th</sup> Sight to PSSA Comparison

Shoemaker: 4 <sup>th</sup> Sight to PSSA Comparison				
Lentest	3 <sup>rd</sup> 4 <sup>th</sup> Sight M	M PSSA	3 <sup>rd</sup> 4 <sup>th</sup> Sight R	R PSSA
7 <sup>th</sup>		77	87	65
8 <sup>th</sup>		82	82	80
11 <sup>th</sup>		68	60	64
				57

## PSSA Level Breakdown

= %Adv > %Prof  
= %BB > %Basic

7 <sup>th</sup> Reading				
Lentest	Thomas	Shoemaker	Pickett	
%Adv	19	21	26	14
%Prof	35	43	36	42
%Basic	23	29	21	26
%BB	22	8	16	18

8 <sup>th</sup> Reading				
Lentest	Thomas	Shoemaker	Pickett	
%Adv	57	52	55	38
%Prof	28	35	29	33
%Basic	7	9	8	16
%BB	8	4	6	13

11 <sup>th</sup> Reading				
Lentest	Thomas	Shoemaker	Pickett	
%Adv	11	21	18	
%Prof	44	44	39	
%Basic	33	21	23	
%BB	13	14	19	

7 <sup>th</sup> Math				
Lentest	Thomas	Shoemaker	Pickett	
%Adv	49	56	62	50
%Prof	22	33	25	28
%Basic	11	6	5	11
%BB	18	6	8	11

8 <sup>th</sup> Math				
Lentest	Thomas	Shoemaker	Pickett	
%Adv	51	52	56	24
%Prof	32	33	27	41
%Basic	14	12	15	21
%BB	3	3	3	14

11 <sup>th</sup> Math				
Lentest	Thomas	Shoemaker	Pickett	
%Adv	25	19	16	
%Prof	34	37	44	
%Basic	25	24	16	
%BB	15	21	26	

## 10

Mastery Average Reading Level  
Average Growth

# Project Narrative

## Section 6 - Other Attachments: Supplemental Organizational Budgets and Financial Information

Attachment 1:

Title: **Budget Information MCS Pages: 3** Uploaded File: **Section 5 Budgets and Financial Info.pdf**

**Mastery Charter School Expansion Grant Budget -- FY 11-15 -- Add 15 schools/ +8,527 students**

<b>INCOME</b>		FY 11	FY 12	FY 13	FY 14	FY 15
Schools w/ Planning Year (PY): PY \$200K, Yr 1 \$220K, Yr 2 \$150K						
Schools w/o PY: Yr 1 \$220K, Yr 2 \$150K, Yr 3 \$150K						
Grant Award from DOE						
A) 3 open Fall 2010 add 2000 students		\$660,000	\$450,000	\$450,000		
B) 3 open Fall 2011 add 1650 students	Plan yr FY 11	\$600,000	\$660,000	\$450,000		
C) 3 open Fall 2012 add 1650 students			\$600,000	\$660,000	\$450,000	
D) 3 open Fall 2013 add 1650 students				\$600,000	\$660,000	\$450,000
E) 3 open Fall 2014 add 1650 students					\$600,000	\$660,000
CSP Grant	\$7,950,000	\$1,260,000	\$1,710,000	\$2,160,000	\$1,710,000	\$1,110,000
MATCH	\$2,000,000 (NSVF & JY)	\$500,000	\$500,000	\$500,000	\$500,000	

**EXPENSES**

<b>SCHOOL LEVEL EXPENSES</b>		FY 11	FY 12	FY 13	FY 14	FY 15	
<b>PERSONNEL</b>	App. School Leaders (4/sch in plan yr)	\$984,005	\$1,050,600	\$1,082,118	\$812,405	\$0	*FY 14 covered by MCS
	Fringe on ASLs 32%					\$0	\$336,192 covered by MCS
	Teacher Coaches 80k/pp FY 11	\$80,000	\$329,600	\$509,232	\$524,509	\$540,246	picked up by
<b>Contracts</b>	Fringe on NTCs \$0.32	\$25,600	\$105,472	\$162,119	\$167,841	\$172,879	
	Value Added System (MVAS - NESSO)	\$45,000	\$75,000	\$100,000	\$55,000	\$22,500	avg \$10-15K/yr ps for
<b>Books/Instr Materials</b>							
	New Classroom/Inst Materials (books/ pre-testing supplies/ grow a grade materials/ instructional interv matls) Actual cost: \$750K for 3 schools / over 2 yrs	\$372,174	\$364,710	\$496,797	\$167,737	\$181,578	
<b>TOTAL: SCHOOL LEVEL SUPPORT</b>		\$1,506,779	\$1,925,382	\$2,350,266	\$1,727,492	\$917,203	\$8,427,122

**Central Office Level (15% max)**

**PERSONNEL**

(9 mos in FY 11; 12 mos in FY 12-15)

Dir, PD & Coaching*	Sal	\$78,750	\$108,150	\$111,395	\$57,368	\$29,545	*100% yrs 1-3; 50% yr 4; 25% yr 5
Project Director**	Sal	\$44,248	\$62,500	\$64,375	\$66,306	\$49,241	** 50% 4 yrs; 35% year 5
<b>FRINGE</b>	32%	\$39,359	\$54,608	\$56,246	\$39,576	\$25,211	
<b>Central office Support</b>							
<b>TOTAL</b>		\$162,357	\$225,258	\$232,016	\$163,250	\$103,997	
% of total grant award:		12.89%	13.17%	10.74%	9.55%	9.37%	cap 15%

**TOTAL DIRECT COSTS:**

\$1,669,136	\$2,150,640	\$2,582,282	\$1,890,742	\$1,021,200	\$9,314,000
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**Indirect @ 8%**

\$100,800	\$136,800	\$172,800	\$136,800	\$88,800	\$636,000
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TOTAL GRANT AWARD	\$1,260,000	\$1,710,000	\$2,160,000	\$1,710,000	\$1,110,000	<b>\$7,950,000</b>
TOTAL MATCHING FUNDS (year spent)	\$509,936	\$577,440	\$595,082	\$317,542	\$0	<b>\$2,000,000</b>
Budget Balanced?	\$0	\$0	\$0	\$0	\$0	<b>\$9,950,000</b>

Mastery Charter School Expansion  
Year by Year Budget Breakdowns - 3 Schools/year in Three Phases

<b>FY 11</b>		<b>\$660,000</b>	<b>\$600,000</b>
Ind		\$52,800	\$48,000
\$162,357 CO		\$84,426	\$77,931
ASL		\$0	\$474,069
TC		\$105,600	\$0
Books		\$372,174	\$0
MVAS		\$45,000	\$0
		<b>\$660,000</b>	<b>\$600,000</b>
Match ASL -			\$509,936

<b>FY 12</b>	<b>\$450,000</b>	<b>\$660,000</b>	<b>\$600,000</b>
Ind	\$35,129	\$53,671	\$48,000
CO	\$58,567	\$87,851	\$78,840
ASL	\$0	\$0	\$473,160
TC	\$326,304	\$108,768	\$0
Books	\$0	\$364,710	\$0
MVAS	\$30,000	\$45,000	\$0
	<b>\$450,000</b>	<b>\$660,000</b>	<b>\$600,000</b>
Match -			
ASL			\$577,440

	Yr 3	Yr 2	Yr 1	Plan Yr
<b>FY 13</b>	<b>\$450,000</b>	<b>\$450,000</b>	<b>\$660,000</b>	<b>\$600,000</b>
Ind	\$36,000	\$36,000	\$52,800	\$48,000
CO	\$60,000	\$48,742	\$58,310	\$64,964
ASL	\$0	\$0	\$0	\$487,036
TC	\$224,062	\$335,258	\$112,031	
Books	\$104,938	\$0	\$391,859	\$0
MVAS	\$25,000	\$30,000	\$45,000	\$0
<b>Subtotal</b>	<b>\$450,000</b>	<b>\$450,000</b>	<b>\$660,000</b>	<b>\$600,000</b>
Match -				
ASL				\$595,082
	* 2 TC			

Planning Year	\$600,000
Year 1 Implement.	\$660,000
Year 2 Implement.	\$450,000
*Year 3 (sch w/o pl yr)	\$450,000

\*allocation for 3  
schools in category in  
given year

	Yr 2	Yr 1	Plan Yr
<b>FY 14</b>	<b>\$450,000</b>	<b>\$660,000</b>	<b>\$600,000</b>
Ind	\$36,000	\$52,800	\$48,000
CO	\$42,445	\$63,668	\$57,138
ASL	\$0	\$0	\$494,863
TC	\$346,175	\$346,175	
Books	\$15,380	\$152,357	
MVAS	\$10,000	\$45,000	\$0
<b>Subtotal</b>	<b>\$450,000</b>	<b>\$660,000</b>	<b>\$600,000</b>
Match ASL			\$317,542

	Yr 2	Yr 1
<b>FY 15</b>	<b>\$450,000</b>	<b>\$660,000</b>
Ind	\$36,000	\$52,800
CO	\$42,639	\$61,358
ASL	\$0	\$0
TC	\$356,562	\$356,562
Books	\$7,299	\$174,279
MVAS	\$7,500	\$15,000
<b>Subtotal</b>	<b>\$450,000</b>	<b>\$660,000</b>

# MASTERY CHARTER EXPANSION PLAN

	Yr 1 CSP		Yr 2 CSP		Yr 3 CSP		Yr 4 CSP		Yr 5 CSP		
	FY10	FY11	FY12	FY13	FY14	FY15					
# of new schools	-	3	3	3	3	3				540	students per new sch.
Total number of schools	4	7	10	13	16	19					
Students in existing schools	2,079	2,425	4,045	5,665	7,285	8,905					
Students in new schools	-	1,620	1,620	1,620	1,620	1,620					
Total number of students	2,079	4,045	5,665	7,285	8,905	10,525					
Revenue	41,461,250	58,066,250	74,671,250	91,276,250	107,881,250	\$	10,250	per child			
Central Office (CO) Revenue	3,316,900	4,645,300	5,973,700	7,302,100	8,630,500		8.0%	Central Services fee			
CO Expenses base	(5,600,000)	(5,900,000)	(6,300,000)	(6,700,000)	(7,100,000)						
CO Loss	(2,283,100)	(1,254,700)	(326,300)	602,100	1,530,500		(1,731,500)				
Apprentice School Leaders	(1,300,000)	(1,300,000)	(1,300,000)	(1,300,000)	(1,300,000)		(5,200,000)	12 leaders/year			
New School Start-up Costs	(3,000,000)	(3,000,000)	(3,000,000)	(3,000,000)	(3,000,000)		(15,000,000)	1,000,000 per school			
New School Facilities	(3,000,000)	(3,000,000)	(3,000,000)	(3,000,000)	(3,000,000)		(15,000,000)	1,000,000 per school			
TOTAL NEED	(9,583,100)	(8,554,700)	(7,626,300)	(6,697,900)	(4,469,500)		(36,931,500)				
PLEDGES											
Foundation Current Pledges	500,000	1,000,000	1,000,000	400,000							
Newschools*	1,000,000	1,333,000	1,333,000	1,333,000							*CSP match pledged
B Lentfest	1,333,000	1,500,000									
J. Yass*	1,000,000										*CSP match pledged
TOTAL FUNDS PLEDGED	3,833,000	3,833,000	1,733,000				9,399,000				
Cash On Hand	3,160,780	(2,589,320)	(7,311,020)	(13,204,320)	(19,902,220)	(24,371,720)					
TOTAL NEEDED FOR FIVE YEAR EXPANSION	1,260,000	1,710,000	2,160,000	1,710,000	1,110,000	7,950,000					
**If CSP Awarded to Mastery											
TOTAL NEEDED FOR FIVE YEAR EXPANSION						(24,371,720)					
TOTAL STILL NEEDED FOR FIVE YEAR EXPANSION w/ CSP GRANT FUND AWARD						(16,421,720)					

\*CSP match pledged

\*CSP match pledged

# Project Narrative

## Section 7 - Other Attachments: Additional Information

Attachment 1:

Title: **Mastery Other Expansion Related Attachments** Pages: **42** Uploaded File: **Sect 7 other full upload.pdf**



## **Section 7: Other Attachments for Mastery Charter School Expansion**

- |  |             |
|--|-------------|
| 1. Mastery Instructional Standards and Strands for Instruction | pages 2-7   |
| 2. Teacher Handbook (includes pay for performance information) | pages 8-29  |
| 3. MVAS Teacher Report Reference and FAQs                      | pages 30-39 |
| 4. Mastery Support Network Organization Charts                 | pages 40-43 |



# Mastery Charter Schools- Instructional Standards 2009-2010

## What are the Instructional Standards?

The Instructional Standards are a compilation of fundamental best teaching practices, successful teacher traits as well as common measures of student success. The standards have been distilled from a wide variety of resources and are supported by Madeline Hunter's classic instructional text: Mastery Teaching. Each standard is designed to create an objective-driven, rigorous and effective classroom experience that will serve to prepare students for higher education, the global economy and the pursuit of their dreams.

## How are the Instructional Standards Organized?

Instructional Standards	1. Objective Driven Approach
	2. Classroom Systems
	3. Instruction
	4. Student Motivation
	5. Rigorous Engagement

There are 5 Standards: Each standard is followed by a series of strands that are subdivided into *Student Outcomes* and *Teacher Actions*. *Student Outcomes* convey the expected result of successful routine implementation of the standard. *Teacher Actions* convey the requisite implementation practices for the standard. Each strand is described at a level 3 (proficient). A level 5 (outstanding) description is included for each standard. Under select *Teacher Actions* suggested strategies are bulleted. Further explanation regarding these suggested strategies can be found within the Mastery Charter PD Library.

## How are the Instructional Standards used?

Teachers are encouraged to routinely reflect on their practice in light of the Instructional Standards. The standards provide a common language and expectation to facilitate peer and administrative observations as well as coaching and professional development. At the student level, the standards serve to create a common instructional experience across classes by instituting valuable rituals and strategies.

## Classroom Observations:

During observations, success is measured by comparing teacher and student actions against the practices described in the Instructional Standards. During formal observations, each category is separately rated. An overall observation rating is also provided. **The overall rating is not an average but rather a determination of the degree to which all categories were delivered with success.** The following describes the category and overall rating systems for formal observations.

	Individual Standard Rating System	Overall Observation Rating System
1=unsatisfactory:	The integrity of the standard was not maintained. The standard is an area of considerable concern. Typically, two or more strands were not observed at the proficient level.	One or more standards were rated a 1.
2=developing:	The integrity of the standard was insufficiently maintained. The standard is an area of some concern. Typically, two or fewer strands were not observed at the proficient level.	All standards were rated at least a 2.
3=proficient:	The integrity of the standard was maintained. The standard is not an area of concern. Typically, most or all strands were observed at the proficient level.	All standards were rated at least a 3.
4=advanced:	All strands were observed when appropriate and delivered in an exemplary fashion. Several qualities described in the "outstanding" description were observed.	All standards were rated at least a 3 with three or more standards rated a 4 or 5.
5=outstanding:	All strands were observed when appropriate and delivered in an exemplary fashion. Most qualities described in the "outstanding" description were observed. The spirit of the standard was raised to new heights.	All standards were rated at least a 4 with two or more standards rated a 5.

Objective-Driven Approach		Mastery lessons are objective-driven! Instruction serves to meet the objective in an efficient and urgent manner. The objective is measurable and addresses content/skills that are prioritized by the curriculum and student data. Success is determined at the end of every lesson. Objective- Instruction- Assessment. We're focused!...Super focused!	
STRAIDS		3- proficient	5- outstanding
STRAIDS	STUDENT OUTCOMES	Objective Focus Students understand and maintain focus on the objective throughout the lesson.	Instruction focuses on a rigorous learning objective that was expertly designed and selected to meet the needs of the students and serve the school goals. Students and teacher connect the lesson objective with future larger goals. The cycle of objective- instruction- assessment is implemented with integrity. The teacher is highly in tune with the students' experience and is very aware of what is being learned and who is learning it. Throughout the lesson, students are keenly aware of the purpose of the lesson and how content/skills will be acquired and assessed. Progress is apparent and conveys inevitable success. The objective(s) pervade all aspects of instruction. Homework, posters, worksheets... all communication is centered around and focused on the objective(s). Assessment confirms that an instructionally transformative experience occurred.
	TEACHER ACTIONS	Appropriate Objective The objective(s) was selected based on identified instructional need via curricular pacing, BM analysis, and student achievement data. The objective is rigorous and consistently above the students' independent work level.	
		Well-Constructed Objective The objective(s) is student centered, action oriented, and measureable.	
		Conveyed The objective(s) is introduced to students at the start of class and continually reinforced throughout the lesson.	
		Driving Objective The objective(s) serves as the overt driving force of the lesson. Minimum of 75% of lesson time is allocated to directly addressing lesson objective(s). DI, GP and IP directly reinforce the objective. Background information, supportive review and management are limited to less than 25% of the lesson.	
		Objective Assessment By the end of class, students are assessed to determine their success in meeting the objective. Either through IP, exit slips, sampling, etc. students and teacher are made aware of the success of the lesson. Objective and Assessment are 100% aligned. Quantitative data informs regarding the number of students who experienced success.	

Classroom Systems		Excellence begins at the door and continues until the last student leaves! Classroom procedures and the physical environment drive student achievement. Instruction is organized and efficient. Urgency, organization, and an academic focus are ever-present. There is not a minute to lose!	
STRANDS	STUDENT OUTCOMES	3 - proficient	5 - outstanding
		<p>100% of students are prepared and ready to learn. The students' body language conveys buy-in. They are properly uniformed and prepared with the correct instructional materials, books, pens, etc... Distractions such as bags, food, beverages, electronics, etc. are out of sight.</p> <p>Once entered, students start working with minimal verbal prompting. Throughout the lesson, students follow well established routines and rituals.</p>	<p>The classroom is neat and orderly. The lesson runs like a well-oiled machine. From the minute they enter, all students are intensely engaged in academics. Routines, rituals and strong organization serve to maximize time and increase achievement. Student actions and behaviors are the result of positive well-rehearsed procedures and significant student buy-in. Teacher prompting is replaced by positive ingrained student habit. The agenda board informs students and maintains teacher-student alignment. The physical environment is expertly used to support instruction and motivate students. No opportunity is missed. Teacher directed systems positively influence student organization regarding note-taking, daily planning, materials maintenance, etc... The classroom, students and teacher create a refreshing, inviting and highly efficient feel.</p>
	TEACHER ACTIONS	Routines	Predetermined classroom procedures regarding instructional routines, student organization, and behavior are consistently reviewed, retaught and enforced in an effort to increase efficiency and maintain discipline.
		Introduction	The introduction is limited to 10 minutes and consists of a) greeting students at the door, b) conducting a "do now" and c) reviewing the agenda board and objective.
		Seating	Chair/table organization is designed to match current instructional/management strategy (group/pair work, testing, teacher centered, etc.) Chairs are facing instructional source.
		Board	Agenda board and general boardwork font is visible from all student seats. Information is complete, updated daily and addresses the current class. The agenda board is prominently displayed, organized, informative and contains the following: a) greeting, b) date, c) do now, d) objective e) day's agenda f) homework.
		Neat	The classroom is neat, organized and clutter free.

Instruction		Effective instruction means all students learn. Great lessons are focused and responsive. Instruction provides the modeling, guidance and practice required for students to meet the objective. Students are engaged and challenged. Instruction results in students' ability to independently demonstrate skill and/or content knowledge. Mastery teachers believe in the transformative power of instruction!	
STRANDS	STUDENT OUTCOMES	3- proficient	5- outstanding
	Mastery	All students display evidence of significant progress or mastery of the objective.	Independent student success is the goal and it is achieved. Modeling provides clear guidelines for success and GP addresses misconceptions and struggles. Efficient and clear communication results in desired student actions. Instruction supports full release of responsibility during independent practice. Examples, models and practice assignments are highly purposeful in design and confirm the students' ability to transfer skill from one scenario to multiple other scenarios. Student concerns and pitfalls have been forecast and resources have been proactively put in place to facilitate student independence. Reliance on handouts, teacher guidance and visuals is evident as a necessary intermediate step but never an end goal. Instruction is rich and dense, filled with experiences that are precisely aligned to the objective. Checking for understanding is constant, efficient and inclusive of all students. Instruction is differentiated in response to assessment and other data sources. Academic visual aids are exemplary in function and presentation. Homework provides multiple and varied experiences to practice and develop content knowledge and skills.
	Direct Instruction	Instructor delivers information needed for students to meet lesson objective. Direct instruction models learning/cognitive process and expected student end products.	
	Guided Practice	Instructor provides opportunity for students to demonstrate new learning or review while under direct supervision and in collaboration with the instructor. The instructor is constantly assessing students. If student success is determined, independent practice is implemented. If students display a lack of success, additional direct instruction or guided practice is provided.	
	Independent Practice	Instructor provides opportunity for students to independently demonstrate new learning. Independent practice is focused on short, meaningful chunks with high repetitive frequency. Full release of responsibility is experienced. Confirmation of understanding during independent practice is rewarded rather than completion of examples or speed during practice.	
	Checking for Understanding	Teacher frequently checks for understanding using appropriate, strategic and efficient strategies. • Whole Questioning • Wait Time • Scanning	
	Clear Directions	Directions regarding student actions and behavior are frequent, clear, specific, sequential and observable. Directions are often communicated both verbally and visually. Directions regarding student behavior focus on what to do rather than what not to do.	
	Visuals	Transparencies, slide shows and other visuals are prepped to guide instruction. Key words & graphics are presented to clearly stand out and are isolated in an effort to focus student attention. Relevant permanent & semi-permanent visual aids are visible from all student seats and not encumbered by or accommodating less relevant information.	
	Homework	Assigned homework is estimated to require a minimum of 45 min for major and 30 min for minor subjects. Homework is provided at the students' independent work level and focuses on review and the practice of confirmed learned skills. Homework is not used to introduce new content/skills. Homework is assigned every day.	

Student Motivation		Mastery teachers motivate their students to greatness! Classroom management sets the stage for quality instruction. Direct communication, relationships and proactive/reactive strategies are consistently employed to motivate and require active participation in the lesson. High expectations are matched by equally high support and positive student-teacher rapport. The ship is sailing and everyone is on board! Ahoy!	
STRAIDS	STUDENT OUTCOMES	3- proficient	5- outstanding
	TEACHER ACTIONS		
Respect		Student engagement is respectful and goal oriented.	The teacher is clearly in command and well respected. 100% of students are participating and on task. Students are engaged, displaying urgency, motivation and focus. Student ownership of learning and classroom involvement is exemplary. Misbehaviors are always addressed and always with confidence and respect. The bar for student performance is high and never provides room for off-task behavior. Student behaviors reflect the teacher's high expectations. Teacher interventions and motivating strategies focus on raising the bar not merely meeting it. The classroom rapport is positive and motivating as well as compliant and orderly. Individual student needs are considered when providing motivation. Students don't merely believe they can be successful; they are provided with the plan and the rationale. Displays of student work are common, recent and exemplary. They serve to push the bar higher. Public tracking systems conveniently assist the students and teacher in determining progress and maintaining focus on the goals. The teacher's persistence, determination and dedication to all students pervades all aspects of the lesson.
Participating		≥95% of students are actively participating in the lesson, engaging the instructor and playing a non-passive role in the class.	
On Task		100% of students are actively on task, displaying academic posture and maintaining appropriate focus.	
Urgency		Students display a sense of organized urgency during all parts of the lesson.	
Strong Presence		The teacher's presence is commanding, respectful and purpose-driven. • Economy of Language • One Voice • Stay on Track • Face and Focus • Calm Before the Storm • Registers	
Positive		Praise and motivating messages are presented in multiple and sincere forms. A positive tone permeates the lesson. A minimum ratio of 3 positive comments to 1 negative comment is employed. • Assume the best • Narrate the positive • Speak Success and Challenge • Motivation and Praise	
Pacing		Activities are openly timed and time constraints are enforced and respected. All parts of the lesson are adequately delivered. "Down time" is avoided. A sense of urgency is evident during all parts of the lesson.	
Redirection		Students exhibiting inappropriate/off task behavior are addressed. • Proximity • Group Reminder • Anonymous Reminder • Signaling • Quick Word • Quick Public Correction • Consequence	
Sweat It All		Posture, uniform and other nondisruptive yet non-compliant issues are readily addressed. The bar is set high and maintained.	
Rapport		The teacher displays positive professional relationships with all students and consistently models appropriate communication skills.	
Displaying		Classroom is adorned with recent student work, recognition of student achievement and tracking systems. Displayed student work is exemplary and grade appropriate.	

Rigorous Engagement		Challenge is the name of the game! Mastery teachers know that instructional time is best utilized when students are reaching for that next rung on the ladder. Rigorous student engagement means academic sweat. This isn't a maintenance workout. We're always stepping it up! Students are constantly facing new challenges along with the opportunities to practice and the motivation to be successful.	
STRANDS		3- proficient	5- outstanding
STUDENT OUTCOMES	Work Hard!	Students are consistently cognitively engaged and working hard. Students actively address the challenges provided.	All students are being challenged and working hard throughout the lesson. The lesson, from design to execution, is characterized by rigor. The objective is ambitious yet still met with success. The teacher, skillfully challenges students without frustrating or demotivating them. The lesson is made instructionally dense by taking advantage of opportunities to engage students and push the majority of the cognitive work onto their plates. When questioning/engaging students, the teacher, consistently and effectively asks for more. Less than excellent responses are seen as opportunities for further engagement. High order questioning is frequent and exemplary. The bar is high and the pervasive message is- we must reach it.
	Instructional Density	Direct and instructionally dense activities are chosen over less efficient or arduous activities. Instructional choices maximize students' cognitive engagement and encourage students to bear the load of as much of the work as possible. All facets of the lesson (objective, instruction, questioning, assessment, etc...) push students to work, engage, think and focus. "Busy work" is avoided.	
	Release of Responsibility	The tide of instruction is overtly moving towards student independence. As success is observed, the teacher reduces support in an effort to reach full independent student proficiency.	
	Grabbing Engagement	During review or GP, the teacher constantly identifies opportunities for students to engage and share the cognitive load. • What's next? • Stopping Short • Puppeting • Whole Questioning	
	High Order Engagement	High order engagement accounts for a minimum of 1/4 of all verbal questioning. High order is defined as comprehension, application, analysis, synthesis and evaluation as opposed to knowledge (basic recall). • On The Hook • Specific, Complete and Well-Presented Answers • Defend Support and Improve	
TEACHER ACTIONS			



***Mastery Charter Schools***  
*Excellence. No Excuses.*

# **Excellence by Design**

**Mastery Charter Schools  
Teacher Handbook  
2009-2010**



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***All students learn the academic and personal skills they need to succeed in higher education compete in the global economy and pursue their dreams.***

## **Welcome to the Mastery Community,**

Together, we will ensure that all students learn the academic and personal skills they need to succeed in higher education, compete in the global economy, and pursue their dreams. We believe that educational inequity is the most pressing social problem facing our country—the civil rights issue of our day. Mastery exists to solve the problem. We believe it is imperative that every child receives a quality, college-preparatory education. With your support, Mastery is creating a network of exceptionally high performing urban schools that demonstrate that all students—not just those attending selective schools—can succeed and achieve academically. Our purpose is to raise the bar for urban education and prompt system changes. We live by our motto: “Excellence. No Excuses.”

We are relentlessly committed to student achievement. We know that all students can and must achieve. Our expectations are high, our desire for success is intense and our timeline is aggressive. We use clear and concrete measures to determine achievement. When we fail, we own it and look to develop better and more effective methods. We constantly explore new strategies to increase our effectiveness and we never get hung up on pedagogical fads or ideologies. We know that high expectations must be matched by high and efficient support. We are united by our shared mission, the urgency of the calling and our relentless pursuit of academic achievement for all.

Mastery integrates modern management and effective educational practices to drive student achievement. Our program is distinct in several ways. Most importantly, our teachers are outstanding and relentlessly committed to student achievement. Mastery instruction means teaching and supporting students until they learn. Our teachers continually improve their craft through frequent feedback, coaching, and collaborative support. Instruction is grounded by a common pedagogical model and guided by focused standards-based curricula. We align assessments to clear objectives and use assessment data to direct instruction. We utilize a mastery-based grading system and a scaffolded course structure that addresses students at their incoming skill level, yet holds all students to a single college preparatory graduation standard.

Mastery creates an achievement-focused school culture by sweating the small stuff while fostering meaningful, personalized relationships between students and adults. To support the transition to a high expectations culture, we explicitly teach students problem-solving and social-emotional skills. All students receive workplace skills training and participate in internships to ensure they develop the real world skills required for college and the global economy. In short, Mastery insists on high expectations and high support so all students can achieve success.

## **Our actions are supported by our VALUES:**

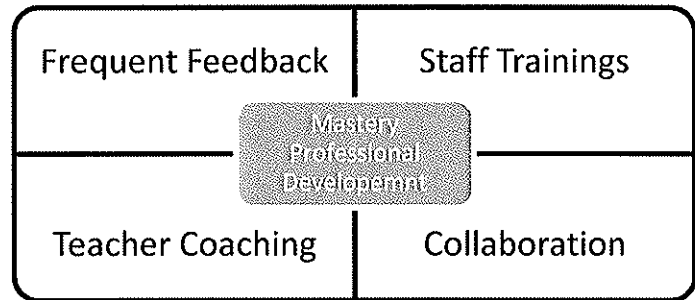
- 1. Student Achievement -- Above All**  
Student achievement is the civil rights issue of our time and the reason we exist. Each staff member is responsible for our students' success.
- 2. We Serve**  
We serve students and their families first. Our business is their success.
- 3. The High Road**  
We do the right thing. We are fair and treat folks with respect.
- 4. Grit**  
Our students' futures are at stake – we don't give up. We do more with less. If it doesn't work, we fix it. We find a way.
- 5. Joy and Humor**  
Our positive, caring culture supports student and staff success. We like fun. We love to laugh.
- 6. Straight Talk**  
We face reality, communicate honestly and respectfully, and hold each other accountable.
- 7. Open Doors**  
Everybody is welcome to talk to anybody. We are open and transparent.
- 8. Continuous Improvement**  
We seek a better way – always. We are engaged in an ongoing cycle of goal setting, action, measurement, and analysis.
- 9. One Team**  
We are in this together. We may disagree, but at the end of the day, we support each other 100%.



## Professional Development and Feedback

### Overview:

Mastery Charter's PD program is comprised of four ongoing initiatives: a) Frequent Feedback b) Staff Trainings c) Teacher Coaching d) Collaboration and Peer Observations. These initiatives are united by a common model of instruction and classroom management that values measureable success, efficiency and a positive student-teacher rapport. This model is referred to as Mastery's Instructional Standards.



### The Mastery Instructional Standards:

The Instructional Standards are a compilation of fundamental best teaching practices, successful teacher traits as well as common measures of student success. The standards have been distilled from a wide variety of resources and are supported by Madeline Hunter's classic instructional text: Mastery Teaching. Each standard is designed to create an objective-driven, rigorous and effective classroom experience that will serve to prepare students for higher education, the global economy and the pursuit of their dreams.

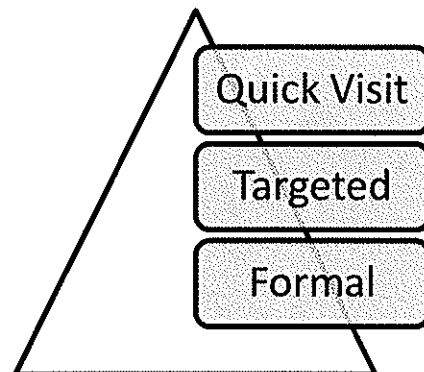
There are 5 Standards: Each standard is followed by a series of strands. Strands are divided into "Student Outcomes" and "Teacher Actions". Student Outcomes convey the expected result of successful routine implementation of the standard. "Teacher Actions" convey the requisite implementation practices for the standard. Each student outcome and teacher action is written at a level of proficiency. Under select teacher actions, suggested strategies are bulleted. Further explanation regarding these suggested strategies can be found within the Mastery Charter PD Library.

INSTRUCTIONAL STANDARDS
1. Objective Driven Approach
2. Classroom Systems
3. Instruction
4. Student Motivation
5. Rigorous Engagement

Teachers are encouraged to routinely reflect on their practice in light of the Instructional Standards. The standards provide a common language and expectation to facilitate peer and administrative observations as well as coaching and professional development. At the student level, the standards serve to create a common instructional experience across classes by instituting valuable rituals and strategies.

### The Mastery Instructional Standards and Teacher Feedback:

Frequent and high quality feedback is at the core of Mastery's PD program. Feedback is developed via three modes of observation: Quick Visits, Targeted Observations and Formal Observations. Each mode results in documented feedback on the teacher's observed performance in relation to the Instructional Standards. Members of the school's Leadership Team serve as observers. Observations are typically not scheduled to facilitate a random sampling. In situations in which the teacher believes the observation timing did or will not result in a typical representation of performance, they are encouraged to inform the observer as soon as possible.



### Characteristics of Feedback Modes

Observation Mode	Focus	Characteristics	Feedback Presentation	Feedback Results	Minimum Frequency
Quick Visit (QV) Observations	5 QV Strands	2-5 minute	QV check Box Form placed in mailbox the day of	General and brief feedback	1/report period (1-5) Total=5
Targeted Observations	Specific strand or set of strands.	5-20 minutes	Targeted Feedback Form placed in mail box by EOW	General and brief feedback	2/semester Total=4
Formal Observations	All Instructional Standards	Full class period + lesson/unit plan and student work evaluation. Optional pre-meetings	Formal Observation Feedback Form is presented during scheduled debrief	1-5 overall rating as well as individual standards ratings	Assoc/Sr. Assoc <ul style="list-style-type: none"> <li>• 3/3 phases Adv/Master</li> <li>• 2/3 phases</li> </ul> Phases:* 1. 9/21-10/30 2. 11/2-1/8 3. 1/11-3/26
Mid Year Evaluation	Summative feedback re: <ul style="list-style-type: none"> <li>• Observations</li> <li>• Mastery Values, Contributions, &amp; Responsibilities</li> <li>• Student Achievement</li> </ul>	Administrator-Teacher Conference	Mid Year Evaluation Form	Narrative feedback with summarized results	Once between:* 1/11 and 2/12
End of Year Evaluation	Summative feedback re: <ul style="list-style-type: none"> <li>• Observations</li> <li>• Mastery Values, Contributions, &amp; Responsibilities</li> <li>• Student Achievement</li> </ul>	Administrator-Teacher Conference	End of Year Evaluation Form	Narrative feedback with summarized results	Once between:* 4/12 and 4/30

*\*Dates may vary slightly*

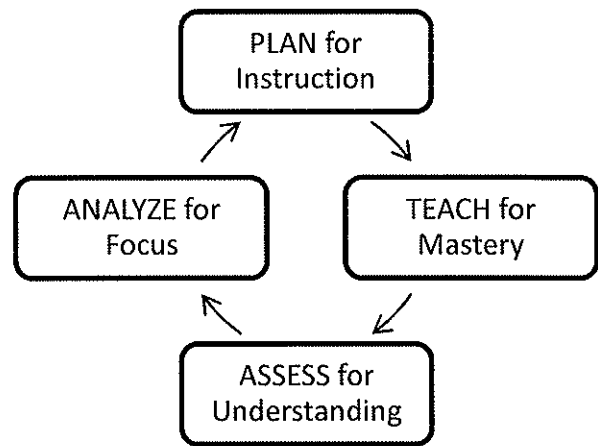
#### **Mastery Coaching Model:**

A primary facet of individual teacher support at Mastery is the Mastery Coaching Model based upon the Instructional Standards. The Mastery Coaching Model begins with setting clear concrete goals for teacher improvement, designing and executing a series of aligned coach supports and monitoring teacher improvement. Through Mastery Coaching, teachers build new skills, ingrain effective habits, incorporate best practices and utilize excellent instructional strategies. Coaching facilitates teacher improvement from struggling to solid, solid to strong, and strong to exemplary. At each campus the leadership team and select teachers serve as coaches and work with individual teachers throughout the year.



***The Instructional Cycle***

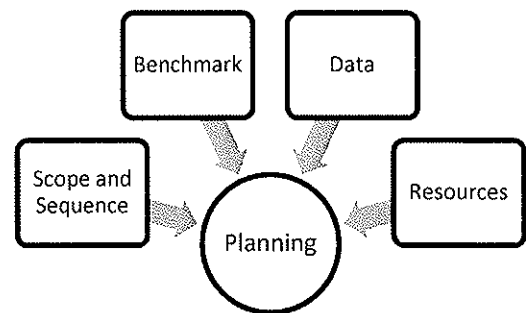
The Mastery Instructional Cycle is a workflow that ensures instructional time is targeting new and review material as well as addressing deficits. In addition, the cycle helps ensure that struggling students are identified and receive the supports they need to be successful. The cycle is comprised of four components: a) Planning, b) Teaching, c) Assessment, d) Analysis. The Cycle plays out in multiple arenas. At the CMO (Charter Management Organization) level, assessment data is analyzed to augment curricula and benchmarks. At the school level, data supports the design of additional after school and Saturday programming. And, most importantly, at the teacher level, unit and lesson plans as well as individualized supports are influenced by the data and CFU.



### Planning

The single most important question is “what to teach?” A series of sequential actions supports the answer and requisite planning. In an idealized planning session:

1. The **Scope and Sequence** document specifies the content that will be measured on the Benchmark. This is the step that supports the identification of baseline content/skills that should be taught within the report period.
2. Next, a thorough examination of the end assessment occurs. In most instances, the end assessment is the Mastery **Benchmark** or a teacher developed assessment that measures a subset of the benchmark skills. Planning with the end in mind and backmapping from that end will dramatically impact student success. Reviewing the benchmark assists the teacher in translating the standards into the questions that will be used to measure acquisition of the skills/content. This is an essential honing exercise.
3. An examination of available **data** is the next step. Typically, available data includes
  - a. Individual student and class data regarding whole assessment data (% correct).
  - b. Individual student and class data regarding performance on individual standards.
  - c. Individual student and class data regarding performance on individual questions.
  - d. Current and past report period grades



Reviewing the data often results in multiple significant outcomes such as:

- a. Which standards need to be readdressed?
  - b. Which students need support regarding a specific standard?
  - c. How are students doing on specific question types- open ended, multiple choice, diagram-based, etc...?
  - d. Which students require significant broad intervention?
  - e. What is the most common cause for current course failure?
4. **Resources** are now reviewed. What does the teacher have to support instruction? Textbooks, teacher resources, ancillaries, strategies, etc...

Once the Scope and Sequence, upcoming assessment, data and resources have been reviewed, a unit plan and lesson plans are developed.

### Teaching

During instruction, the unit and lesson plans as well as checking for understanding are supporting the teacher’s development of daily objectives and the instructional standards are driving instructional delivery and values.

### Assessment and Analysis

All instruction culminates in assessment. The analysis of the assessment results produces the data that is used in the next planning phase.



## **Benchmark Assessment Manual**

### **Who takes the Benchmarks?**

Students who have qualified or likely will qualify for the PASA (Pennsylvania Alternate System of Assessment) may be excused from taking the Benchmarks. The school's Special Education Department is responsible for creating an alternate and appropriate proxy assessment. All other students are required to take the Benchmarks.

### **How do Benchmarks impact report period grades?**

Each Benchmark is counted as predetermined percentage of the student's grade for each subject for each report period. If this conflicts with information or the spirit of information in an IEP, the Principal can alter this percentage.

### **What accommodations/modifications are permitted?**

Accommodations for the Benchmark are limited to those that are considered acceptable for the PSSA. For a complete list of PSSA accommodations go to:

[http://www.pde.state.pa.us/a\\_and\\_t/lib/a\\_and\\_t/AccommodationsforallStudents2007.pdf](http://www.pde.state.pa.us/a_and_t/lib/a_and_t/AccommodationsforallStudents2007.pdf)

Modifications to the form and content of the Benchmark assessment are performed only by the CMO. In such cases, the revised Benchmarks are used across all schools. Posters, visuals and other aids that may provide support during testing are to be removed or covered. PSSA approved tools such as formula sheets are permitted. Typically, modifications or exemptions are only granted to students that would qualify for PSSA modifications such as PASA.

### **To what extent should the Benchmark guide instruction?**

The Benchmark is designed to complement the scope and sequence in providing guidance regarding both instructional content and rigor. Mirroring question stems, format and model during instruction is encouraged yet not to the degree to which a Benchmark question or assessment becomes invalid or "gamed". Professional judgment is a must and teacher-administrator communication is encouraged when considering gray areas.

#### **General Guidelines**

- Avoid providing background regarding reading passage content or vocabulary
- Teach the skills/content tested on the BM rather than the questions on the benchmark
- Avoid providing details regarding the test or test format that are not available with the PSSA

### **Test Security**

Schools and teachers are required to take all precautions in maintaining the security of the Benchmarks. Benchmark questions and entire assessments are often recycled yearly. Students should never have access to the assessments outside of the classroom. Students should never receive copies of the assessments or information that will permit them or their associates to have an advantage. Concerns regarding test security should be reported to the Principal immediately.

### **Scheduling/Pacing**

Benchmark schedules are always to be followed regardless of the individual teacher's pacing.



In order to facilitate communication between teachers, administrators and parents, teachers are routinely required to complete and submit documents, attend meetings and participate in a range of professional tasks. The following list identifies several examples of such tasks.

Document Submission	Meetings/Conferences/PD	Miscellaneous
Lesson Plans	Parent Events/Meetings	Report Period Grade Verification
Unit Plans	Staff Meetings/PD	Timely Grade Book Updates
Phone Logs	IEP Meetings	Timely Attendance Updates
Data Analysis Forms	Disc./Atten Hearing/Meetings	Performance and Feedback Surveys
Emergency Lesson Plans	Admin-Teach Conferences	Book tracking
	Peer Reviews	Room Maintenance

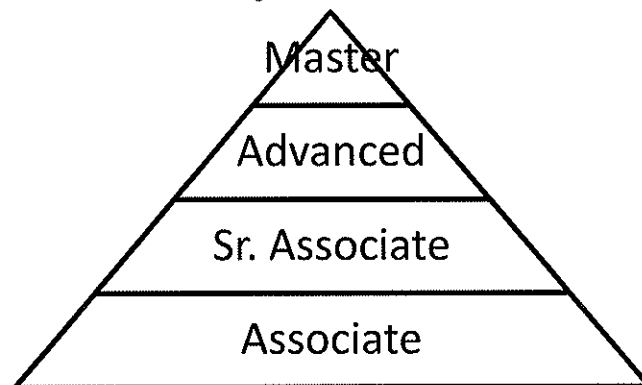
### **School Management Committee (SMC)**

Instructor participation in the ongoing management of the school is valued at Mastery. Mastery leadership has an open door policy and instructors are encouraged to raise any concerns, assist in problem-solving, and propose new initiatives. The SMC is comprised of a minimum of three instructor representatives from differing departments and members of the non instructional teams. SMC meetings are typically held either biweekly or monthly with the principal. The meetings are intended to address concerns raised by staff, review policy, and proactively problem-solve school needs and interests.



## Performance-Based Teacher Advancement System

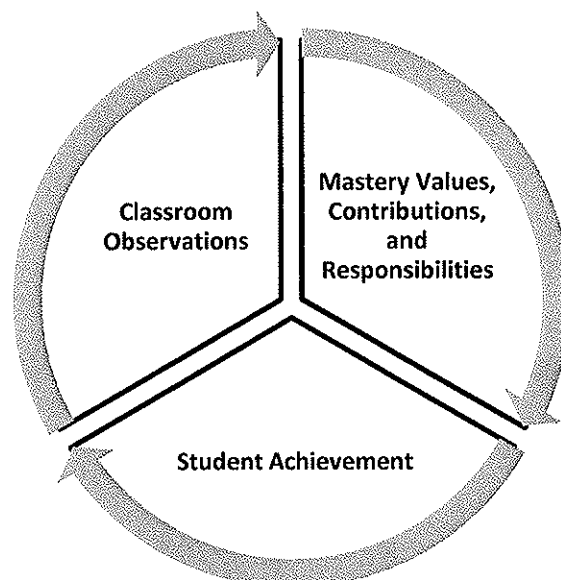
Mastery Charter employs a performance based teacher advancement system. By basing advancement on performance rather than seniority, Mastery intends to attract, support, and retain the highest quality teachers and therefore provide our students with the best possible instruction. The system has four teacher categories, each with a specific advancement criteria and salary range. The teacher categories are "Associate", "Senior Associate", "Advanced" and "Master." Consistent with Mastery Values, the system strives to make the advancement standards, processes, and salaries fair and transparent.



### **Advancement Criteria**

For the 2009-10 school year there are three criteria areas that determine advancement:

- 1. Classroom Observations: Instructional Effectiveness**  
Mastery's Instructional Standards (IS) are the basis for our instructional model. The standards serve to create a common definition of instructional quality. During Quick Visits, Targeted Observation and Formal Observations, success is measured by comparing teacher/student actions against the practices described in the IS.



## 2. Mastery Values, Contributions & Responsibilities

We believe that in order to achieve our ambitious mission, all staff must uphold the Mastery values, fulfill their responsibilities and actively contribute to the school community. Consequently, teachers will receive feedback regarding performance in:

- Upholding the Mastery Values in relationship to the Mastery community, including students, peers, administrators, and parents.
- Fulfilling the responsibilities described in this handbook as well as other reasonable requests made by their supervisor.
- Contributing to the success of the school especially when going above and beyond the expectation.

## 3. Student Achievement

Annual academic goals regarding assessments and grades are developed for each teacher, by the leadership team in collaboration with the teacher. In addition, Mastery will pilot a value-add program that is intended to increase the accuracy of expectations. All academic goals will also take into account the course level and students served.

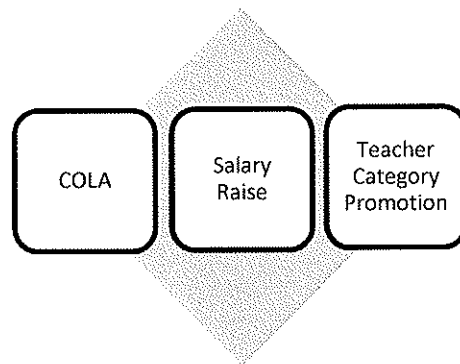
The chart below details the different teacher categories, salary ranges for each category, and the expectations for teachers in the different categories for observations and visits, Mastery values, and student achievement.

Teacher Category	Salary Range	Criteria		
		Observation Score Expectations	Mastery Responsibilities, Values and Contributions Expectations	Student Achievement
Associate	\$43,500 - \$50,500	Demonstrates a 2 ('Developing') rating with progress toward a 3 ('Proficient'). Shows progress toward executing the Mastery Instructional Model	Fulfills Mastery job responsibilities and acts consistently with Mastery's values	Evidence of student progress towards academic and achievement goals
Senior Associate	\$50,600-\$58,500	Demonstrates a 3 ('Proficient') rating or above in observations and is proficient in executing Mastery's Instructional Model	Fulfills Mastery job responsibilities and acts consistently with Mastery's values	Students meet expected academic and achievement goals
Advanced	\$58,600-\$65,000	Demonstrates a 4 ('Accomplished') rating or above in observations and is accomplished in executing Mastery's Instructional Model	Exceeds Mastery job responsibilities and exemplifies Mastery's values. Supports the success of other teachers.	Students demonstrate accelerated academic achievement on multiple and varied measures
Master	\$65,100-\$72,000	Demonstrates a 5 ('Outstanding') rating in observations and is outstanding in executing Mastery's Instructional Model	A leader that drives the Mastery mission and values. Displays consistent, significant and measured impact on the school's performance through instruction, coaching, leadership and PD.	Students demonstrate breakthrough academic achievement on multiple and varied measures. Ambitious academic goals regularly exceeded



### **End of Year Evaluation**

The major function of the End of Year Evaluation is to determine the contract offer for the coming year. Typically, contracts are renewed with one of three outcomes:



#### **Teacher Category Promotion (includes salary raise)**

Meets the criteria for promotion in all areas:

- Observation performance in all competencies are always at the promoted category level
- Always meets the described performance level for job responsibilities and Mastery values at the promoted category level
- Meets student achievement criteria described by promoted category level
- Teachers newly promoted to a category are placed at the beginning of that category salary scale

#### **Salary Raise**

Meets the criteria for current level and exceeds criteria in some areas:

- Observation performances are mixed, with some scores or competency areas at the next higher category level and others at the existing category level
- Meets, and often exceeds, the described performance level for job responsibilities and Mastery values at the current category level
- Meets student achievement criteria described by current category level
- Teachers who meet all criteria for the category are placed in the middle of the salary range. Teachers who exceed in many areas but have not met the criteria for promotion are placed at the higher end of the salary range.

#### **COLA (Cost of Living Adjustment)**

- Performance is at the current category level for observations and some competency areas may be below expectation
- Usually meets the described performance level for job responsibilities and Mastery values at the current category level
- Makes limited progress toward academic goals for students
- Teachers who are struggling to meet all criteria for the category will receive a COLA (an annual increase in pay to reflect price inflation)

### **Non Contract Renewal**

If the teacher's evaluations have been unsatisfactory, the teacher may not be offered a contract for the following school year.

To ensure such decisions are not capricious, the following procedures must be followed:

- The teacher will receive a warning letter regarding unsatisfactory performance.
- A second warning letter must be offered with notice that performance is unsatisfactory and that a teacher's current position or contract offer for the following year is in jeopardy. An Improvement Plan must be offered, with the second warning, which makes improvement expectations clear. The plan should offer supports to the teacher in meeting the expectations. Mastery's Human Resource Director and CAO will be notified.
- A written evaluation of the Improvement Plan is created. The evaluation must state whether the goals of the Improvement Plan have been met.

Note: this process does not apply in cases where the teacher's actions have violated the law, placed students or staff in danger, or otherwise violate employment regulations that constitute grounds for immediate dismissal.

### Appeal/Review Process

A teacher who feels his/her salary placement has not been determined consistently with the above guidelines, should first discuss these concerns with his/her Principal. If the matter is not resolved with the Principal, the teacher should contact HR and request that HR review the salary determination. HR will require that the teacher state in writing the reason they believe the salary placement guidelines have not been followed appropriately.

HR will review the evaluation data and discuss the matter with the Principal. HR will make a recommendation and review the recommendation with the CEO and COO. The decision will be presented to the teacher.

### Contract Signing

In May, teachers decide whether to accept a contract for the following school year. In order to hold a position, contracts must be signed and returned within two weeks of receiving it. Teachers who notify the Principal prior to May 1, 2010 that they are returning will be eligible for a signing bonus described in the contract. Reneging on a signed contract will result in a loss of accrued benefits and the annual bonus described in the contract.



## *The Academic Program*

### Course Options

The following is a listing of courses commonly offered at each grade. Actual campus schedules will vary. Select courses are offered at different levels.

	English	Math	Science	Social Studies	SEL	Enrichment
<b>7</b>	-Literature 7 -Reading 7 -Writing 7	-Math 7		-Ancient World History	-7 <sup>th</sup> Seminar	-Music 7 -Art 7 -PE 7
<b>8</b>	-Literature 7 -Reading 7 -Writing 7	-Math 8 -Algebra 8	-Science		-Elective	-Music 8 -Art 8 -PE 8
<b>9</b>	-Eng Lit 9 -Eng Comp 9	-Pre-Algebra -Algebra I -Geometry	-Intro Physics		-Fresh Seminar -Health/PE9	-Tech 9
<b>10</b>	-Eng Lit 10 -Eng 10	-Algebra I -Geometry -Algebra II/Trig	-Biology	-Mdrn World Hist -AP Human Geog -AP Psych	-Soph Seminar	-Music 10 -Art 10
<b>11</b>	-American Lit -AP Lang	-Geometry -Algebra II/Trig -Pre-Calc	-Chemistry	-US History -AP US Hist	-Jr. Seminar	-Spanish I
<b>12</b>	-Brit and Wrld Lit -AP Lit	-Algebra II/Trig -Pre-Calc -AP Calc AB	-Physics -AP Bio -AP Chemistry	-Government -Economics	-Sr. Seminar	-Spanish II

### Report Cards, Grades and Attendance Reporting

The Mastery school year is divided into semesters 1 and 2. Each semester contains three report periods. Each report period grade is a non-cumulative grade. At the end of a semester, a cumulative semester grade is determined. The cumulative semester grade determines pass/fail status and is reported on the student's transcript

Rather than a traditional A-F grading system, Mastery utilizes an M and I system. "M" represents course Mastery (76% or above). "I" represents Incomplete mastery (75% or less). An "I" is the equivalent to a failure. Courses that result in a cumulative semester grade must be recovered in summer.

Semester 1			Semester 2		
Report Period 1 77 (M)	Report Period 2 75 (I)	Report Period 3 80 (M)	Report Period 4 81 (M)	Report Period 5 85 (M)	Report Period 6 90 (M)
Final Course Grade = 77.3 (M)			Final Course Grade = 85.3 (M)		

In general, report period grades are divided into three categories:

25% Benchmark score

25% Homework

50% Tests, Quizzes and Classwork

See individual course scope and sequences for course specific information.

### **Course Credit and Credit Recovery**

All courses are limited to 1 semester. Courses that meet 5 or more times per week for 1 semester earn 1 credit. Courses that meet 2 times per week for 1 semester earn 0.5 credits. Independent Reading (IR) is embedded within advisory. Students earn a 0.5 credit IR grade.

Students that fail  $\leq 3.5$  credits are required to recover those credits during summer school. If all credits are not recovered by the end of summer school, the student is retained and repeats the grade in the fall (including all passed and failed courses.)

**Students that fail  $> 3.5$  credits are automatically retained and repeat the grade in the fall (including all passed and failed courses.) Summer school is not an option for these students.**

Exceptions and accommodations may be made but course recovery is generally not permitted during the school day.



## ***Student Culture Programs***

### **The Mastery Code of Conduct**

The Mastery Code of Conduct drives school culture. Its language should be utilized often when motivating students. Students should be familiar with the code and able to recite it from memory.

CODE OF CONDUCT
I choose to be here. I am here to learn and achieve. I am responsible for my actions. I contribute to a safe, respectful, cooperative community. I come with a clear mind and healthy body. This is my school... I make it shine.

### **The Road to College**

Mastery Charter is a college preparatory school. Our mission centers on success in higher education. Most of our students will be the first in their family to graduate from college. It is vital that we instill in our students the expectation of college graduation as an inevitable event on their road towards success. We discuss college experiences, goals, considerations, etc... with our students. College is an ongoing theme. We create environments that show college pride and engage students in conversation about our experiences.

## **Merits, Demerits and Dean Referrals**

### **Merits**

Each student is assigned a Merit Card and carries the card in their ID badge holder. When a staff member observes exemplary behavior, s/he asks for the Merit card and applies a merit to the card. Students are not to receive multiple merits for a single behavior/action. Students that solicit merits should not be accommodated. After acquiring a predetermined number of merits, students are awarded prizes according to an incentive menu.

### **Demerits**

Each student is also assigned a Demerit Card and carries the card in their ID badge holder. When a staff member observes an offense, s/he respectfully asks for the Demerit Card and records the following: code of offense, date of offense, signature. Staff are encouraged to NOT engage in conversation about the demerit. The intent is for the demerit to be quick, focused feedback on negative behavior. The demerit serves as a warning. Thus, warning students that they might receive a demerit for their behavior is not encouraged. Students are not to be given multiple demerits for a single offense. If the offense is deserving of greater attention, the student should be referred to the Dean. If the offense is the sixth in a series of offenses, the staff member holds the card, signs and dates it and then contacts the Dean for pick up. The Dean is responsible for ensuring that a replacement card is distributed as soon as possible. Students that fill a demerit card are scheduled to attend a ~3 hour detention on the following Wednesday.

### **Dean Referrals**

Teachers are expected to manage general student behavior and address low level infractions through proactive and reactive strategies (including the demerit system). Students exhibiting level II infractions such as:

- |            |                  |               |              |
|------------|------------------|---------------|--------------|
| -Pre-fight | -Insubordination | -Intimidation | - Plagiarism |
| -Threats   | - Cheating       | -Bullying     | - Harassment |

should be referred to the Dean. To conduct a Dean Referral, contact the Dean and request an escort. In the event that the Dean does not answer, contact the front desk. If the situation allows, complete a Dean Referral form and present it to the escort. The form should be completed prior to a student's removal. Please make every effort to ensure sensitive information remains confidential.

The Culture Team is responsible for determining actions/consequences and communicating those actions to the teacher within 24 hours. In addition, teachers are expected to use the incident as a teaching/relationship building opportunity and follow up with the student and parent.

The line between Level I and II infractions is sometimes gray. During these gray situations, the teacher is expected to balance the needs of the individual student against the needs of the class. It is important to remember that once a student is removed from the classroom, the student loses valuable academic time. However, if the student is uncontrollable and is preventing others from learning, the student should be removed. Reasonable effort to address the situation is expected in order to maximize academic time for all students.

### **Restorative Practices**

Restorative Practice is an approach to wrongdoing that emphasizes relationships and raises attention to the harm done to victims, offenders, and the overall community. Restorative Practice means that individuals who hurt the school community must make amends and give back to the community for their infraction. The "giving back" does not necessarily replace punitive actions that may result from the infraction. Rather, they are often in addition to such actions. This concept of honoring the community and the relationships within our community is a foundation of our program and our Code.

Restorative consequences are typically designed to restore the wrong doing. If graffiti was the infraction, covering the wall with paint is a reasonable restorative consequence. When trust is broken, facilitated conversations and or apologies may result. The goal is always to take responsibility and make amends.

### **Code Awards**

The Code Awards serve to recognize and motivate students who epitomize characteristics reflective of the Code of Conduct. Awards are granted for displays of success or progress in character, initiative or citizenship. Code Awards are presented during community meetings and other functions.

### **Key Awards**

The Mastery Key Award honors students who master the personal skills/attributes needed to excel in life beyond Mastery Charter – both in higher education and the global community. Periodically, the staff will review the key award nominees and conference on whether the candidate's attitude and talents match the high expectations of a Mastery Key Holder. If a nominee is conferred with the award, it will be announced at Community Meeting. If a nominee is not conferred with the award, they may be re-nominated later in the year.

### **Cohort Behavior Clipboard**

The Cohort Behavior Clipboard (CBC) serves to assess general cohort behavior (grades 7 and 8) and encourage a positive classroom environment. A CBC (clipboard and evaluation form) is assigned to each 7<sup>th</sup> and 8<sup>th</sup> grade cohort. Teachers use the CBC scale (1-5) to evaluate the cohort during the lesson. The evaluation is based on whole group performance in the following areas: participation, body language, and adherence to the classroom rules. The rating may change throughout the lesson. The final rating for the lesson is recorded on the clipboard. The clipboard is carried from class to class in order for each teacher to record a CBC rating. The last period teacher will average the ratings for all periods for the day and return the completed CBC to the Advisor. The process repeats each day. Every Friday, by 4:00, the last period teacher averages the scores for the week, reports this score at the bottom of the page and returns the CBC. The AP of School Culture evaluates the forms, identifies top and bottom cohorts and responds.

### **School Uniform**

Mastery Students wear their uniforms with pride. Teachers consistently demand uniform compliance and excellence in appearance by ensuring that students tuck their shirts, tie their shoes, wear their pants at or above their waist and avoid wearing outerwear or book bags in class. Students who fail to follow these rules should receive a demerit – not a warning.

### **Goal-Oriented Student Engagement**

When addressing misbehaving students, our engagement is always goal oriented. Our objective always serves the needs of the student. Common student engagement objectives include: 1) de-escalation, 2) student accountability, 3) encouragement/inspiration/motivation, 4) re-orientation. Students are never ridiculed, embarrassed, insulted, etc... We never engage in battles of authority or employ empty threats. When engaging students, we model our code of conduct – a respectful, achievement focused community.

### **Community Meetings**

Community Meetings serve to convey school-wide announcements, recognize student achievement and develop a sense of community within the school. All students attend one community meeting weekly. Teachers, along with the support of the Culture Team, organize and run community meetings.

### **Circles**

Circles lay the foundation for a restorative community. Circles foster community, create a safe environment for students to express themselves, and provide an opportunity for students to learn and practice alternative means of expression. Circles are used to address issues before and after they arise or as a check-in. In Circles, everyone is equal and has a voice. Circles are scheduled during one advisory weekly. Each Circle lasts approximately 15-25 minutes.

At the start of the circle, students rearrange the classroom furniture to create a circle of chairs. No furniture is allowed in the middle of the circle. Students' hands should be empty. They should not bring anything into the circle. There should be unobstructed views of each member (i.e. no one sitting behind a desk or table).

Circles can be managed in two ways, "go-around" format, in which every student participating has a turn to speak and will do so in an orderly fashion, or "at will" format where students speak as they feel the need to express themselves and their point of view. Teachers should decide whether or not to use a talking piece to designate the speaker. Three ground rules guide the circle:

1. Active Listening: All members give their attention to the speaker.
2. Respect the Response: Responses are accepted without judgment or discussion.
3. Audible Sharing: Speakers project in order for all participants to hear.

The circle has three phases:

1. Opening/introduction of topic: Students are greeted and the ground rules are reviewed. The prompt is stated and repeated and a response is modeled. The circle format is described and time is given for students to consider their response.
2. Sharing: Students share responses. The facilitator ensures the ground rules are followed.
3. Closing: The facilitator summarizes the responses and thanks the participants for sharing. Furniture is reorganized.

### **Clear Hallways**

Academic time is highly valued. All efforts are made to keep all students in class during academic time. Visits to the restroom, water fountains, nurse, deans, counselor, etc. are granted only during emergencies. Students should use the restrooms during transitions. Students should never be permitted to miss instructional time to go to the photocopier, mailboxes, front desk, or other non-emergency errands. Teachers evaluate and respond to emergencies on a case by case basis. Maintaining a firm policy from the first day of class will likely prevent constant requests.

### **Universal Silencing Sign**

The Mastery universal silencing sign is used to request silence from groups of students in a respectful and familiar way. The sign consists of a raised hand. Once the teacher raises his/her hand, the students are expected to become silent and raise their hands.

### **Student Personal Electronics**

Students are never permitted to use mobile phones, portable music devices, video game devices, laser pointers, etc...in class or hallways. Using such devices as a calculator is prohibited. Such devices should never be visible within class or in hallways. Once confiscated, teachers immediately give the devices to a dean. Confiscated items are only returned to the parent/guardian and only during regular school hours.

### **Food in Class**

In an effort to maintain the quality of the learning environment, avoid pest infestations, and minimize distractions, eating, drinking and gum chewing is strictly prohibited during academic time. Exceptions must be approved by the administration.



## ***Special Education and Student Services***

### **Student Assistance Program (SAP)**

The Student Assistance Program (SAP) is one of the mechanisms by which Mastery provides student support. It is designed to assist school personnel in identifying issues including alcohol, tobacco, other drugs, and mental health issues which pose a barrier to a student's learning and school success. The primary goal of SAP is to help students overcome these barriers in order that they may achieve, remain in school, and advance. If the problem or barrier to learning is beyond the scope of the Mastery, SAP provides the parent and student with information so they may access services within the community. SAP team members do not diagnose, treat, or refer for treatment, but they *may refer students for an assessment for treatment*. It is the parents' right to be involved in the process and to have full access to all school records under state and federal laws and regulations.

### **Mastery Charter School Child Find Policy**

It is the policy of Mastery Charter School that all children with disabilities, regardless of the severity of their disability, and who are in need of special education and related services, are identified and evaluated. Mastery Charter School annually reports special education and related services to the State which children are being served and what services are being provided through the Penn Data system. This applies to all children with disabilities, including highly mobile children (such as migrant and homeless children), and children who are suspected of being eligible under IDEA, even though they are advancing grade to grade.

A practical method has been developed and implemented to determine which children are currently receiving needed special education and related services is reported in accordance to Mastery Charter School's special education plan submitted to the Department of Education in accordance with 22 PA Code § 14.104.

All data and information collected and used under the child find requirements of this section are subject to the confidentiality requirements of 34 CFR § 300.560-300.577.

### **The Mastery Special Education Overview:**

Mastery holds high expectations of every student, regardless of special education status. We are committed to preparing all of our students for success in college and beyond. To accomplish this, all teachers provide a tremendous amount of support for each student. As a result, there is a culture of achievement and a belief that hard work and effort pay off. We prepare all of our students for the same world.

#### **Instruction:**

All Mastery teachers take responsibility for student learning in their classroom. They modify and accommodate their curriculum, lessons and instruction to match student need. If one strategy or accommodation fails, a Mastery teacher utilizes another until special education students experience success. In this way, students in special education are provided with the strategies, tools and instruction that allow them to perform independently at the same level as their peers. The AP of Special Education is available as resource and support to all teachers in supporting students with special needs and should be consulted when multiple strategies are unsuccessful.

#### **Assessment:**

Mastery teachers use assessments to target and individualize instruction for students in special education. Assessments such as Mastery Benchmarks, 4Sight, GRADE, and GMADE are just some of the tools we use to measure academic success. Assessment allows us to measure student achievement and growing independence. Inasmuch as possible, we provide a standardized administration of our assessments so we can measure student growth over time. When an IEP determines that testing accommodations are necessary for an individual student, we consult the PSSA test accommodations for specific modifications and administer in full accordance with their individualized education plan. The achievement criteria for Benchmark grades may be modified with the principal and AP of Special Education's consent and is typically found in a student's IEP.

#### **Curriculum:**

Mastery offers innovative programs to prevent student failure and intervention programs to accelerate learning for students who have fallen behind their peers. Mastery's tiered and leveled curricula are designed to create environments in which students with more basic skills can receive instruction that will ramp up their levels. Every six weeks, students are assessed to determine which skills need to be reviewed and retaught. After school achievement classes are required for students in general and special education students who need additional support. Because our efforts are based on assessment data and not special education status, Mastery nurtures an inclusive culture that responds to student need.

#### **Regulations:**

All Federal and State laws, regulations and procedures related to the education of students with disabilities are strictly followed. Mastery's philosophy of high expectations and high support is crucial in helping us to fulfill these regulations.

### **Child Abuse Reporting Policy**

It is the law in the State of Pennsylvania and the policy of Mastery Charter School that all school employees are mandated reporters of suspected child abuse, which means that all teachers and all staff members are mandated by law to report to the designated administrator, if they receive information or have suspicions that a child/student is being physically, emotionally or sexually abused, whether at home or at school. The following is the procedure to be followed if a suspicion arises:

The AP of Special Education is the school's primary designated reporter for all instances of suspected child abuse. The secondary designated reporter is the Principal. When a school employee suspects that a child/student has been abused, s/he must report the suspicions immediately to the Assistant Principal of Special Education. The Assistant Principal of Special Education will then meet with the Counselor to present the report. The Counselor conducts a brief investigation to assure that there is sufficient suspicion and then contacts Childline, Pennsylvania's Child Abuse Hotline. The Counselor may choose to alert the parents to the report or may choose to not alert them if the parents are the suspected abusers. The School keeps all discussions entirely confidential and all employees are mandated by this policy to maintain confidentiality within the counselor's determination of a need-to-know basis for the benefit of the student, the family, the employees and the institution. All relevant materials are kept by the Counselor in his/her office. Once a suspicion is reported to authorities, all staff members are required to give their full cooperation to investigators as requested. This primarily means being interviewed by investigators. All interviews are confidential.



### **Compensation Supplements and Certification**

#### **Higher Education**

- An instructor who receives his/her Master's degree while employed at Mastery will receive a \$2,000 increase in his/her annual base salary. HR must be notified when the degree is granted. Notifications must be made prior to the annual contract offer in April. If you do not notify HR as soon as your Master's is granted, you may forfeit the possibility of receiving an increase.
- An instructor who receives his/her Doctorate degree while employed at Mastery will receive a \$2,000 increase in their annual base salary. HR must be notified when the degree is granted. Notifications must be made before the annual contract offer in April. If you do not notify HR as soon as your Master's is granted, you may forfeit the possibility of receiving an increase.

#### **Continuing Education and Tuition Reimbursement**

Consistent with Value #6, Continuous Improvement, Mastery encourages staff to continue developing their instructional practice by taking coursework and workshops related to their field.

- Up to \$1,000 annually is available to all staff as reimbursement for educational coursework and/or certification testing and related expenses. Please note that staff must pass coursework to be qualified for reimbursement.
- Any staff member may use up to \$400 (of the \$1000) for education related workshops/seminars (and travel to those seminars).
  - Principals must approve the workshop/seminar request prior to the request for reimbursement. Principals may not approve workshops/seminar (and the related time-off) for various reasons such as conflicts with the regular school schedule and staffing. It is encouraged that the requests be made for workshops/activities that occur during the school and summer breaks.

#### **Additional Daily Course Work**

Scheduled Course work that extends beyond the contracted amount is compensated as indicated below:

- Extra 5 day/week course in core content area is \$8,000 annually for a two semester course
- Extra 7 day/week course in core content area is \$11,200 annually for a two semester course
- Extra 2 day/week seminar course in SEL/Tech/PE/Support is \$2,400 annually for a two semester course
- A RELA/History/Science/Spanish instructor who teaches an extra core course in lieu of a two day/week course gets \$5,600 annually for a two semester course

#### **Additional After School Support**

During the final hour of school (except Wednesdays), all instructors are required to:

- 2 Days per week
  - Teach an Achievement Class or other academic support class **OR**
  - Lead or be responsible for homework club, guardian angel, or Extra Curricular activity
- 2 Days per week:
  - Office Hours

If an instructor teaches an achievement class/GA/Extra Curricular, etc for more than 2 days per week (in place of office hours):

- 1 hour per week/annually = \$1,200 for two semesters
- 2 hours per week/annually = \$2,400 for two semesters
  - Note that this is the same rate as teaching a 2 day/week course

#### **Extra Preps Compensation**

*What counts as a prep?*

A prep is defined as any class that requires a teacher to prepare for a course with a distinct curriculum and scope and sequence. In general, different grade levels or different content areas would count as separate preps. Mastery is committed to having instructors teach no more than two preps without additional compensation.



### *Special Cases*

- **Art, music, technology, PE, SEL:** If a teacher teaches different grade levels for these subject areas, each grade level would be considered a prep as there is a different scope and sequence.
- **Reading and Writing:** Since there is a different scope and sequence, reading and writing are considered to be different preps.
- **Special Education:** Content classes count as preps. Pull-out, push-in, and resource room are considered to be a single prep no matter how many of each a teacher has.
- **Afterschool:** If a teacher is teaching an extra course after school with a distinct curriculum and scope and sequence, he/she will get paid for that extra prep assuming it is the third prep for that teacher.

### *Compensation (Beyond Two Preps)\**

- **\$1,200** for two semesters for an extra class prep (four days per week course)
- **\$600** for two semesters for an extra seminar prep (two days per week course)

*\*Compensation will be paid at the beginning of each semester.*

### Internal Class Coverage

Instructors are required to substitute for colleagues as needed. Every effort will be made to minimize requests and distribute requests equitably. Instructors will be provided with as much notice as the situation will allow. The Assistant Principal of Instruction provides guidance to substitute instructors regarding class content and management. Compensation for coverage is \$30.00/hr of instructional time.

### Saturday School

Instructors are required to teach 2 Saturdays per year. Willingness to teach additional Saturdays is greatly appreciated. If interested in teaching additional Saturday classes, please inform the principal. Compensation for Saturday school is \$40.00/hr of instructional time.

### Summer School

Instructor participation in summer school is greatly appreciated. If interested, please inform the principal or Assistant Principal for Instruction. Compensation for summer school is \$40.00/hr of instructional time.

### Certification

The Employee's employment is contingent upon evidence of appropriate teacher certification and highly qualified teacher status as recognized by the Pennsylvania Department of Education. Failure to maintain certification and HQT status may result in immediate dismissal or non contract renewal.

- **High Qualified Teacher Status:** Each Employee must obtain appropriate HQT status for his/her teaching subject area(s).
- **Certification:** Each Employee must obtain appropriate certification for his/her teaching subject area(s). The Employee's salary will be reduced by \$2,000 until Instructional I certification is on file with Mastery. Those teaching subject areas that do not have PA state certification, such as SEL, are exempt from this policy. Instructors fall into one of the groups below and must comply with the following (please contact the HR department if you have any questions regarding submitting forms for certification):
  - **Uncertified (Emergency Certification):** For employees requiring emergency certification, documents must be completed and submitted to Mastery within one month of hire.
  - **Out-of-State Certification:** Any Employee certified in another state needs to obtain Pennsylvania Department of Education's Instructional Level I certification within one year of hire and submit documentation for Emergency Certification in the meantime.
  - **PA Intern Certification:** Intern certified teachers are required to obtain a Pennsylvania Department of Education's Instructional Level I certification within two years of hire.
  - **PA State Certification:** An Employee who is certified in the state of Pennsylvania with an Instructional I or Instructional II certificate, must maintain his/her status as a PA certified teacher during his/her tenure with Mastery Charter Schools. This includes, but is not limited to, ensuring all professional development requirements mandated by the Pennsylvania Department of Education in Act 48 are met.

## Time Off, Calling Out, Leave and Closings

Holidays, Vacation Days, and Personal Days		
BENEFITS	Teaching Staff	Bank and Rollover Policy
	(10 ½ month employees)	
Vacation Days	School scheduled Winter Break, Spring Break, and Summer Break	
Holidays (*see details below)	Labor Day, Columbus Day, Veteran's Day, Thanksgiving Break, Winter Break, MLK Day, President's Day, Spring Break, Memorial Day, Independence Day (for 12-month employees),	See school calendar for exact dates
Personal Days	7 days (accrual rate is .7 days per month);	On August 15 of each year, employee's banks are reset. Personal days may be rolled over or cashed out at 50%. Employee's personal banks shall not exceed 14 days at any one time. Employees may use days before they are accrued; however, if the employee utilizes days before they are accrued, and terminates employment, the payment for these dates will be taken out of the last paycheck before departure.

\*Eligible, salaried full-time employees will receive a paid day off for each school-observed holiday, where the holiday falls on a workday. Specific school schedules distributed at the beginning of each school year identify the calendar for the year, the number of school days to be worked by instructors and administrative staff plus any additional school scheduled breaks.

### Personal Days

Personal days are intended to provide for days off in cases of personal/family emergency, religious holidays, and sickness. If the personal day is not of an emergency, health, or religious nature, staff must request the personal day in advance and must receive approval from the supervisor. Mastery Charter Schools retains the right to request verification from a licensed health care provider for all absences of more than two consecutive days due to illness. Personal pay may be withheld if a satisfactory verification is not provided by the employee. Note that personal day requests immediately before or after a vacation may not be granted depending on staffing needs.

### Absences

All employees are expected to work on a regular and consistent basis, completing their regularly scheduled hours per week. Excessive absenteeism may result in disciplinary action, up to and including termination. Disciplinary action taken because of absenteeism will be considered on an individual basis, following review of the employee's absentee and overall work record.

Any employee (instructor or administrative employee) who does not call or report to work for two consecutive workdays will be considered to have voluntarily resigned from employment at MCS. If an administrator or manager experiences this situation with an employee, he/she should contact the Director of Human Resources immediately.

A leave of absence for purposes of vacation, personal leave, military or jury duty, or other planned absence, are further described below.

### Instructor Call Out

When preparing for a non-emergency day off, instructors complete and submit a "Time Off Request Form" to the AP of Operations. These forms are available from the AP of Operations. Once the request is approved, the instructor may be requested to contact a substitute service provider. Instructors are strongly encouraged to give 3 days advance notice. This allows the school to prepare for the absence and increase the likelihood that a substitute instructor will be assigned.

In the event of an emergency absence, instructors must contact the Assistant Principal of Operations. Instructors are strongly encouraged to call as soon as possible. If the APO does not answer, it is expected that the instructor will leave a message indicating the instructor's name, contact information and date of return. Upon returning to work, the instructor submits a "Time Off Request Form" to the AP of Operations.

Administrative Staff submit time-off requests via to their manager, copying HR on the email.

### **School Closings**

Mastery follows the School District in regards to snow days. If the Philadelphia School District is closed due to snow, Mastery is closed. In the event of school closing (due to snow emergency or other reason), staff can dial the Philadelphia School District's Snow Closing Hotline at 215-400-7669 or go to <http://www.phila.k12.pa.us/> to see if the District is closed. In addition, Mastery will notify KYW, 1060 AM and Fox 29 TV. **Our number for KYW is #205.**

At times, emergencies such as severe weather, as mentioned above, fires, power failures, or national emergencies, can disrupt school operations. In extreme cases, these circumstances may require the closing of schools. When operations are officially closed due to emergency conditions, the time off from scheduled work will be paid. If an emergency closing has not been authorized, employees who fail to report for work will not be paid for the time off.

### **Professional Dress and Appearance**

The way that employees look, dress and act is vital to our organization and to the ability to serve as a role model for Mastery's students. Due to the school's frequent interaction with the students, parents and the general public, a high standard of personal appearance is expected of employees.

Employees' attire while at Mastery Charter Schools is to be appropriate to the extent that no distracting or disruptive attention or reaction on the part of others is anticipated or caused. Any clothing that has words, terms, or pictures that may be offensive to other employees is unacceptable.

Both male and female employees should choose clothing and hair styles appropriate for a professional business setting. Flexibility is offered to employees in terms of dress within the guidelines below:

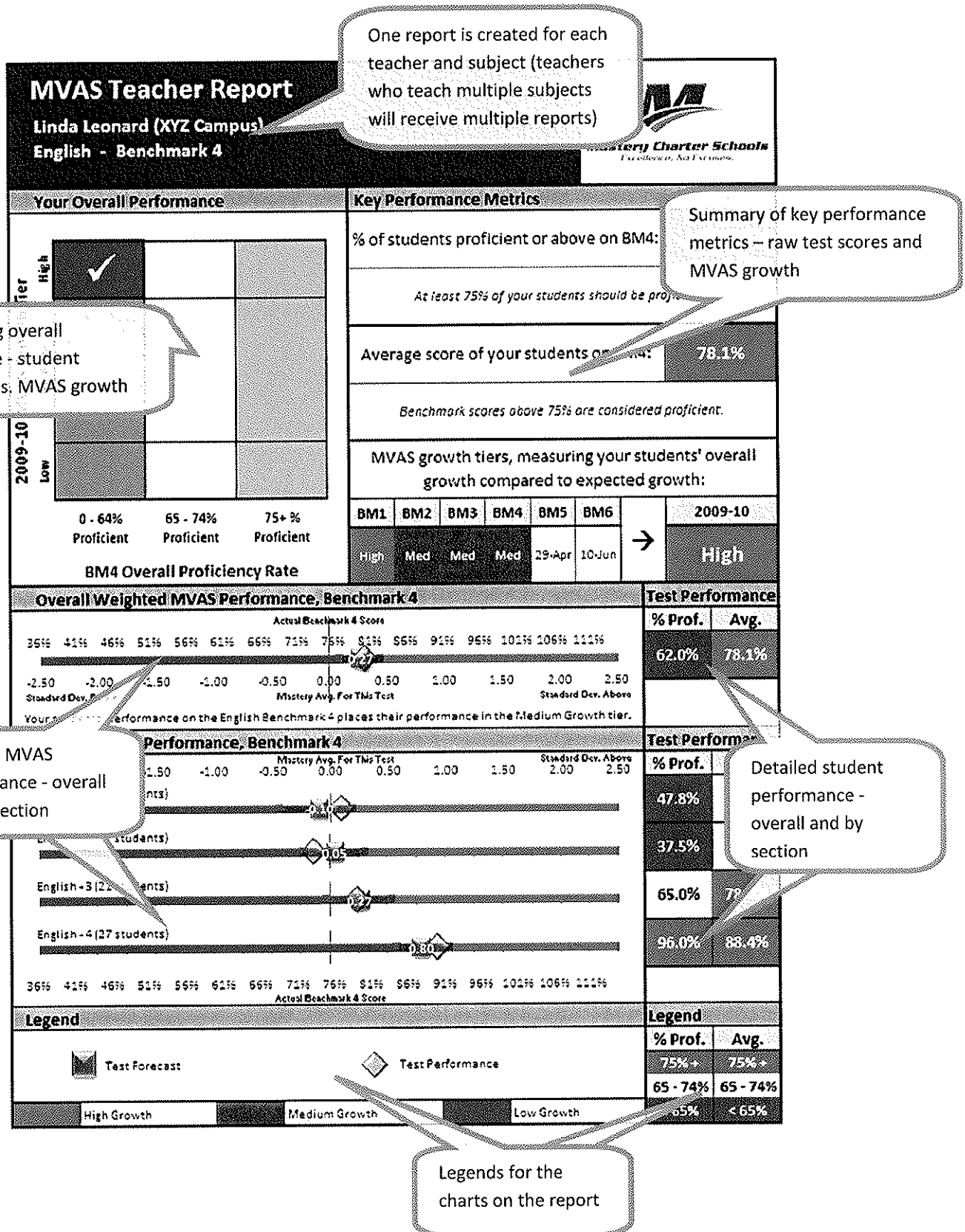
- Blue jeans and t-shirts are not considered professional dress and should not be worn.
- Torn, dirty, or frayed clothing is unacceptable.
- Flip flops and sneakers should not be worn.
- Body adornments and piercings that do not model the professional workplace are not appropriate.
- To create a favorable impression and be a role model to students, one must be well groomed at all times.

## 2009-10 School Year Calendar

August	8/10/2009	Administrator Orientation
	8/17/2009-8/26/09	Teacher Orientation
	8/27/09-9/1/09	Student Orientation
September	9/2/2009	First Day of Report Period 1
	9/7/2009	Labor Day - School Closed
	9/12/2009	Community Picnic*
	9/24/2009	Back to School Night
	9/28/2009	Yom Kippur - School Closed
October	10/12/2009	Columbus Day - School Closed
	10/15/2009	Last Day of Report Period 1
	10/16/2009	Professional Development Day - No Students
	10/19/2009	First Day of Report Period 2
	10/22/2009	Parent-Teacher Conferences*
November	11/11/2009	Veteran's Day - School Closed
	11/26/09-11/27/09	Thanksgiving Break - School Closed
December	12/3/2009	Last Day of Report Period 2
	12/4/2009	Professional Development Day - No Students
	12/7/2009	First Day of Report Period 3
	12/24/09-1/1/10	Winter Break- School Closed
January	1/18/2010	MLK Day - School Closed
	1/27/2010	Last Day of Report Period 3
	1/28/10-1/29/10	Semester Break PD - No Students
February	2/1/2010	First Day of Report Period 4
	2/4/2010	Parent-Teacher Conferences*
	2/15/2010	President's Day - School Closed
March	3/11/2010	Last Day of Report Period 4
	3/12/2010	Professional Development Day - No Students
	3/15/2010	First Day of Report Period 5
	3/29/10-4/2/10	Spring Break - School Closed
April	4/1/10-4/2/10	Spring Break - School Closed
May	5/6/2010	Last Day of Report Period 5
	5/7/2010	Professional Development Day - No Students
	5/10/2010	First Day of Report Period 6
	5/31/2010	Memorial Day - School Closed
June	6/18/2010	Last Day for Students
	6/23/2010	Last Day for Instructors

*\*Dates may vary*

# MVAS Teacher Report Reference – 2009-2010



# MVAS Teacher Report Reference – 2009-2010

Student Details					
Name	Section	Forecast	Actual	Difference	Growth Tier
Noyes, R	English - 1	69% (-0.27 SD)	67%	-3%	Med
Grande, E	English - 1	69% (-0.31 SD)	76%	7%	Med
M...	English - 1	68% (-0.39 SD)	Not Taken	N/A	N/A
		70% (-0.22 SD)	67%	3%	Med
		70% (-0.19 SD)	82%	12%	High
		71% (-0.11 SD)	Not Taken	N/A	N/A
		80% (0.77 SD)	91%	11%	Med
		67% (-0.50 SD)	79%	12%	High
		No prediction	67%	N/A	N/A
		74% (0.21 SD)	85%	11%	High
		75% (0.37 SD)	74%	6%	Med
		75% (0.35 SD)	88%	12%	High
		75% (0.32 SD)	56%	-19%	Low
		78% (0.60 SD)	88%	10%	Med
		70% (-0.19 SD)	70%	-1%	Med
		77% (0.44 SD)	95%	19%	High
Falkner, D	English - 1	76% (0.42 SD)	83%	7%	Med
Blumenthal, J	English - 1	53% (-1.96 SD)	45%	-7%	Med
Cloutier, K	English - 1	68% (-0.39 SD)	61%	-8%	Med
Aston, M	English - 1	No prediction	41%	N/A	N/A
Lemmons, E	English - 1	73% (0.09 SD)	91%	18%	High
Sandifer, N	English - 1	76% (0.34 SD)	67%	-9%	Low
Heller, H	English - 1	75% (0.25 SD)	73%	-2%	Med
Bloomer, R	English - 1	68% (-0.43 SD)	71%	3%	Med
Sussman, M	English - 1	62% (-1.04 SD)	80%	19%	High
Kirsch, F	English - 2	No prediction	Not Taken	N/A	N/A
Gagnon, F	English - 2	73% (0.05 SD)	79%	6%	Med
Kuhn, J	English - 2	74% (0.16 SD)	73%	-1%	Med
Sigler, J	English - 2	74% (0.20 SD)	64%	-11%	Low
Luke, D	English - 2	68% (-0.42 SD)	53%	-15%	Low
Crandall, T	English - 2	76% (0.34 SD)	Not Taken	N/A	N/A
Giroux, K	English - 2	75% (0.29 SD)	85%	10%	Med
Guevara, V	English - 2	77% (0.45 SD)	82%	5%	Med
Kennon, L	English - 2	No prediction	59%	N/A	N/A
Bellows, J	English - 2	73% (0.05 SD)	58%	-15%	Low
Byington, P	English - 2	67% (-0.47 SD)	71%	4%	Med
Lathan, J	English - 2	78% (0.63 SD)	83%	5%	Med
Nicholas, T	English - 2	65% (-0.70 SD)	64%	-2%	Med
Huynh, J	English - 2	71% (-0.13 SD)	59%	-12%	Low
Nickelson, M	English - 2	72% (0.02 SD)	74%	2%	Med
Warrington, L	English - 2	75% (0.31 SD)	74%	-1%	Med
Carley, D	English - 2	77% (0.46 SD)	77%	1%	Med
Cropper, W	English - 2	74% (0.15 SD)	65%	-9%	Low
Stricker, F	English - 2	75% (0.32 SD)	71%	-4%	Low
Denman, B	English - 2	74% (0.16 SD)	Not Taken	N/A	N/A
Christman, E	English - 2	75% (0.30 SD)	91%	16%	High
Usher, J	English - 2	76% (0.38 SD)	73%	-3%	Low
Rembert, J	English - 2	60% (-1.25 SD)	50%	-10%	Med
Lucas, M	English - 2	68% (-0.38 SD)	77%	9%	Med
Finch, A	English - 2	74% (0.21 SD)	83%	9%	Med
Hoy, C	English - 2	73% (0.04 SD)	74%	2%	Med
Singleton, C	English - 2	78% (0.55 SD)	79%	1%	Med
Harrelson, T	English - 3	76% (0.41 SD)	88%	12%	High
McCall, P	English - 3	74% (0.19 SD)	79%	5%	Med
Lund, S	English - 3	79% (0.72 SD)	91%	12%	Med
Means, R	English - 3	69% (-0.36 SD)	71%	3%	Med
Baucom, C	English - 3	78% (0.63 SD)	88%	9%	Med
Mertz, A	English - 3	73% (0.06 SD)	55%	-18%	Low

Each student's test forecast for this benchmark. Prediction reports will show only standard deviations, result reports will show score and standard deviation. The forecast is based on each student's test history.

Each student's actual performance for this benchmark

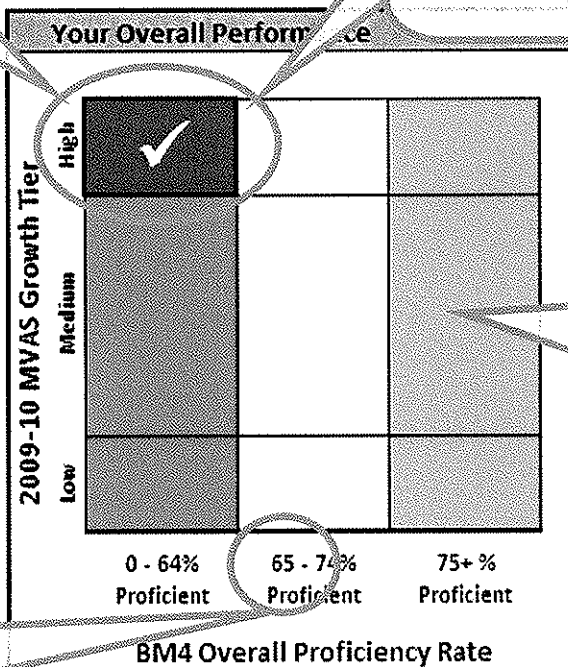
Difference between actual test score and forecasted test score (only shown on result report)

Each student's MVAS growth for this benchmark

## MVAS Teacher Report Reference – 2009-2010

This teacher's students demonstrated High MVAS growth

Less than 65% of this teacher's students achieved proficiency (>75% on the benchmark = proficient).



The green color band indicates a satisfactory percentage of students at proficient or higher

The starting point of the yellow range adjusts to account for the test's level of difficulty.

Percentage of this teacher's students scoring 75% or greater on the most recent benchmark exam

Key Performance Metrics									
% of students proficient or above on BM4:								62.0%	
At least 75% of your students should be proficient.									
Average score of your students on BM4:								78.1%	
Benchmark scores above 75% are considered proficient.									
MVAS growth tiers, measuring your students' overall growth compared to expected growth:									
BM1	BM2	BM3	BM4	BM5	BM6	→	2009-10		
High	Med	Med	Med	29-Apr	10-Jun		High		

MVAS growth for each reporting period

Weighted average score on the most recent benchmark exam for all of this teacher's students across all of their sections

Year-to-date MVAS growth

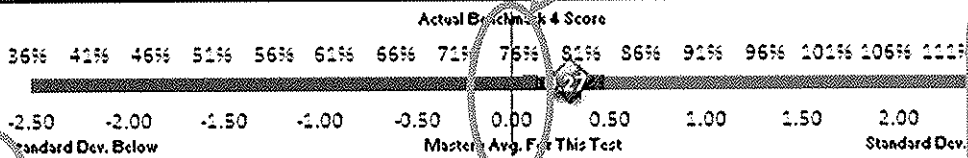


# MVAS Teacher Report Reference – 2009-2010

0.00 standard deviations = Mastery average

On this benchmark, Mastery average was 76%

## Overall Weighted MVAS Performance, Benchmark 4

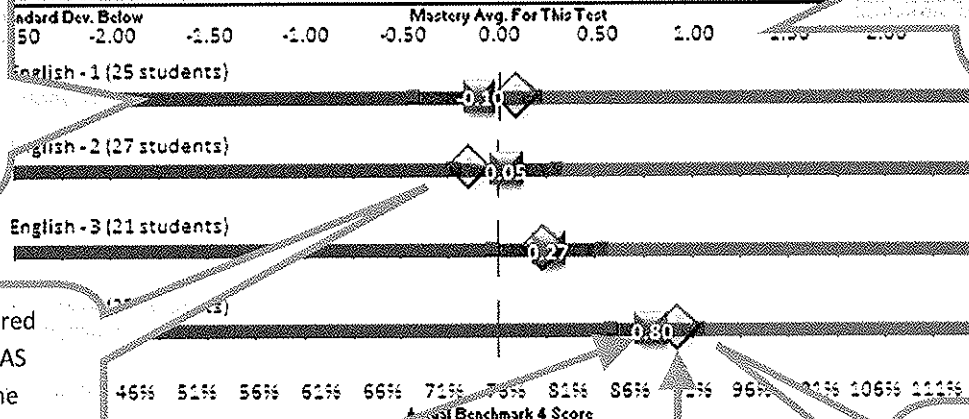


The colors on the line chart represent the MVAS growth tiers

Green = High  
Blue = Medium  
Red = Low

Because each benchmark is different, scores are based on the number of standard deviations above or below the Mastery average.

## Section MVAS Performance, Benchmark 4



This section scored below their MVAS prediction on the most recent exam

This section scored above their MVAS prediction on the most recent exam

Test Forecast

Test Performance

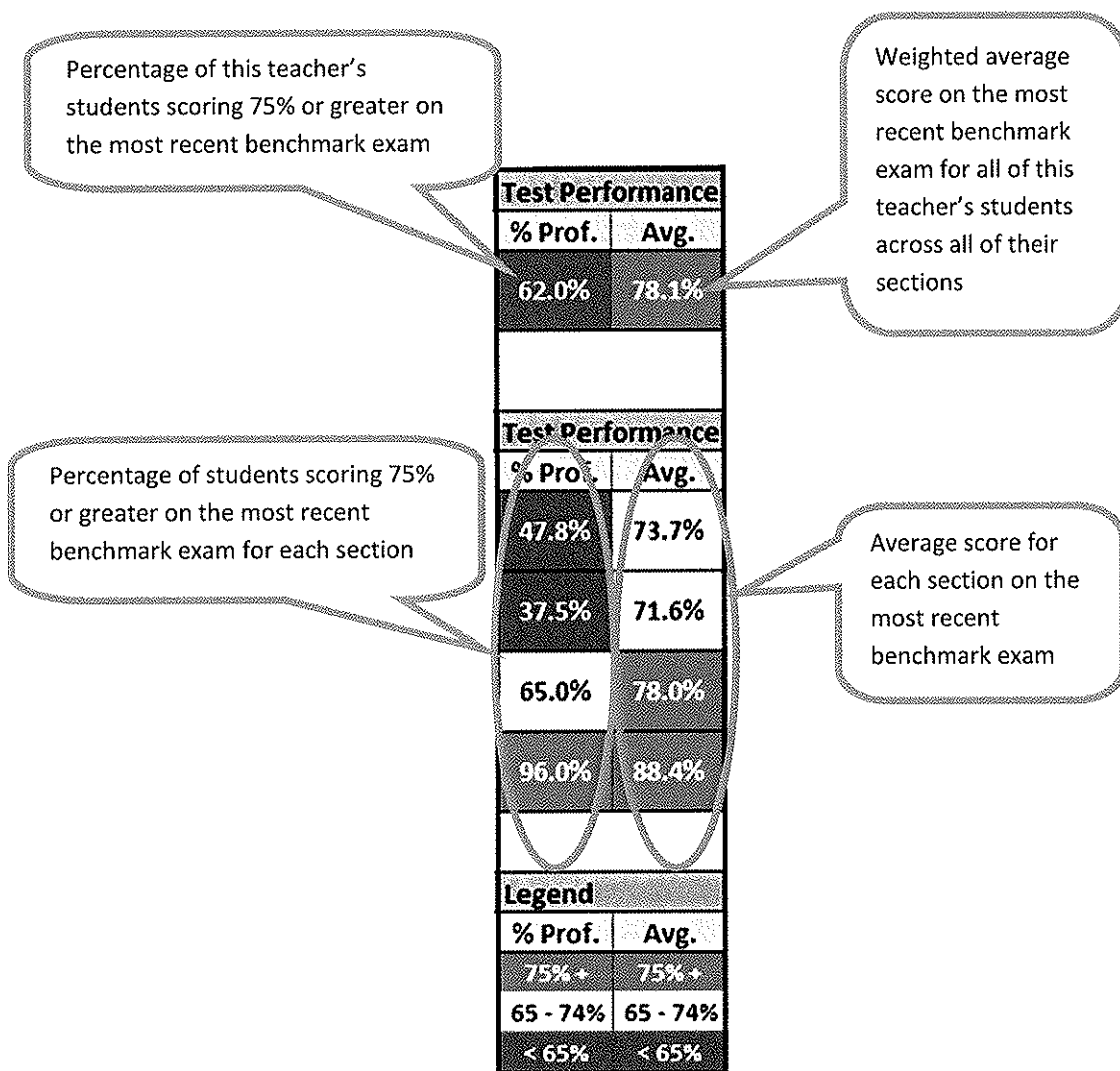
High Growth

Medium Growth

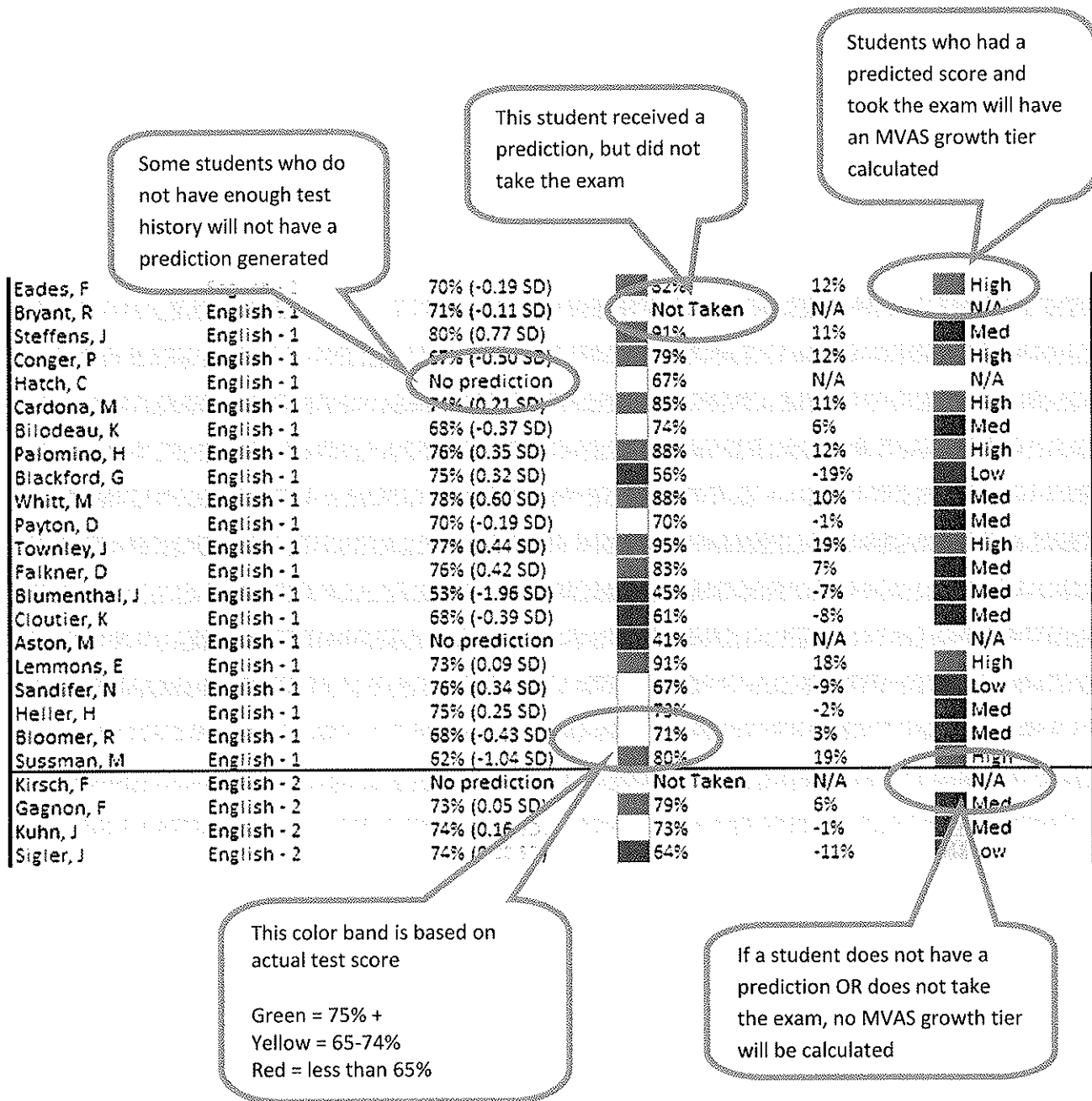
Low Growth



# MVAS Teacher Report Reference – 2009-2010



# MVAS Teacher Report Reference – 2009-2010



## MVAS Frequently Asked Questions – 2009-2010

### **General Questions**

#### ***Why is this system being implemented now?***

MVAS adds to the fabric of feedback that teachers currently receive and creates additional opportunity for recognition beyond raw test scores because it takes student starting points into account. It is the only metric that currently is neutral regarding student level. In other words, obtaining a high MVAS growth score is not easier for the teacher teaching gifted students than it is for the teacher teaching average students. It is also not influenced by the difficulty of a particular assessment.

#### ***Why this system?***

MVAS provides a view of teacher performance that is neutral to students' starting proficiency levels because each student's predicted test performance is tailored to that student's individual history. This allows teachers the opportunity to show growth along the path to bringing a student to proficiency while fairly representing the starting point and varying challenges at different achievement levels.

### **Rollout Questions**

#### ***How will this be explained to teachers?***

We will set up a session at each campus to review MVAS and the new reports that are being created during May or June. Reports will be provided to teachers after each report period that provide updates on performance based on recent benchmark results. Teachers will be provided with an annotated reference that walks them through their report and explains how to interpret the results. The Principals and APIs will be a resource for answering questions.

#### ***What communication tools will be provided?***

- *MVAS FAQ document* – compiles frequently asked questions
- *MVAS Teacher Report Reference* – explains details of the information shown on the teacher report

### **Report Questions**

#### ***Which is more important in the matrix, MVAS Growth or the percent proficient?***

Although growth is very important, the primary mission of Mastery is bringing each student up to proficiency and beyond. The MVAS growth metric creates additional opportunity for recognition beyond raw test scores because it takes student starting points into account. The colors on the matrix have been designed to reflect this – although we would prefer to have high growth, it is more important to be towards the right of the matrix.

## MVAS Frequently Asked Questions – 2009-2010

### ***What do “% Proficient” and “Proficiency Rate” mean?***

These metrics show you the total percentage of the students that achieved a score of at least 75% on the current benchmark. This proficiency rate is displayed both as an overall weighted rate across all of your sections, as well as for each of your sections individually. Note that this proficiency rate may combine multiple benchmarks if you teach multiple grade levels.

### ***What does “Average Score” mean?***

“Average Score” represents the average of all of your students for the current benchmark. This average is displayed both as an overall weighted average across all of your sections, as well as for each of your sections individually. Note that this average may combine multiple benchmarks if you teach multiple grade levels.

### ***What do the rows of numbers above and below the line charts mean?***

The rows of numbers represent the test scoring scale. The numbers shown in 0.50 increments represent standard deviations above and below the Mastery average for that test. This translates the test scale into a normalized format that adjusts for the difficulty of the test. The numbers shown in percentages (if applicable) represent the actual test score. Note that this is not displayed on the prediction reports released prior to the test administration, and is not shown if you teach across multiple benchmark exams, as the test scale is different for each of the benchmarks.

### ***What does the number in the box on the chart represent?***

The number in the box is the number of standard deviations above or below the Mastery average that represents each section’s prediction (or your overall weighted average) for this benchmark exam.

### ***Why does the average score on my line chart not match the average score in the “Test Performance” box?***

The average score on the line chart represents the average of all of your students who both had a prediction and also took the test. The average score shown in the “Test Performance” box represents the average of all of your students who took the test.

### ***When will the reports be available?***

Reports will generally be available approximately 10-15 days after the benchmark exams are taken.

### ***How will teachers receive their reports?***

Reports will initially be delivered as printed hard copy reports, although we may switch to electronic delivery in the future.

## MVAS Frequently Asked Questions – 2009-2010

### **Technical Questions**

#### ***How is the determination of High, Medium, or Low growth made?***

The determination of your MVAS growth tier is based on the average score of your students relative to their predictions. The width of the tiers is based on how much range there is in each student's predicted score. If your students on average perform significantly better than their predictions, you will fall into the High growth tier, while if they perform significantly below their predictions, you will fall into the Low growth tier.

#### ***What data is used to generate predictions?***

It depends on subject, however, for all subjects, the prior two benchmarks are the most significant contributor. In addition, benchmarks from complementary subjects, previous 4Sight exams, and the GRADE exam from the prior year can contribute to the prediction.

#### ***How accurate are the predictions?***

The predictions vary in accuracy by grade level, size of the student population, and the subject. In most cases, the models predict 70-80% of the variation between students and greater than 90% of the variation between sections.

#### ***Is the predicted growth the same for every student?***

No, MVAS creates predictions for each individual student in each subject based on that student's past test history and what similar students have done in the same situation. Predictions are capped so that a student cannot receive a prediction higher than a 95% score on any exam or greater than one standard deviation above Mastery average.

#### ***How many students does a teacher need to have for this information to be meaningful?***

Approximately 20 students should provide enough data to generate an accurate prediction. Note that the predictions will become more meaningful and accurate over the course of the year.

#### ***If a teacher shows growth early in the year, will they receive unrealistic predictions of future growth?***

Because each model uses recent test performance along with historical information, teachers will continue to receive a realistic expectation of further growth opportunity with their students. They will be challenged to continue building upon the gains they have already established.

#### ***Why is the MVAS tier a YTD metric?***

In order to best measure growth over the full year, we build history as the year goes on. The cumulative information is more reliable and a better measure of growth than the individual benchmark views.

## MVAS Frequently Asked Questions – 2009-2010

### ***How does MVAS account for the differing difficulty of benchmark exams?***

Because the benchmarks are not norm-referenced exams, MVAS creates a prediction in terms of standard deviations above/below the Mastery average. If a test is particularly challenging or easy, the predictions will automatically reflect that when they are translated into test scores. This allows for the combination of different test types into a unified measure.

### ***Can all of the teachers show “High” growth?***

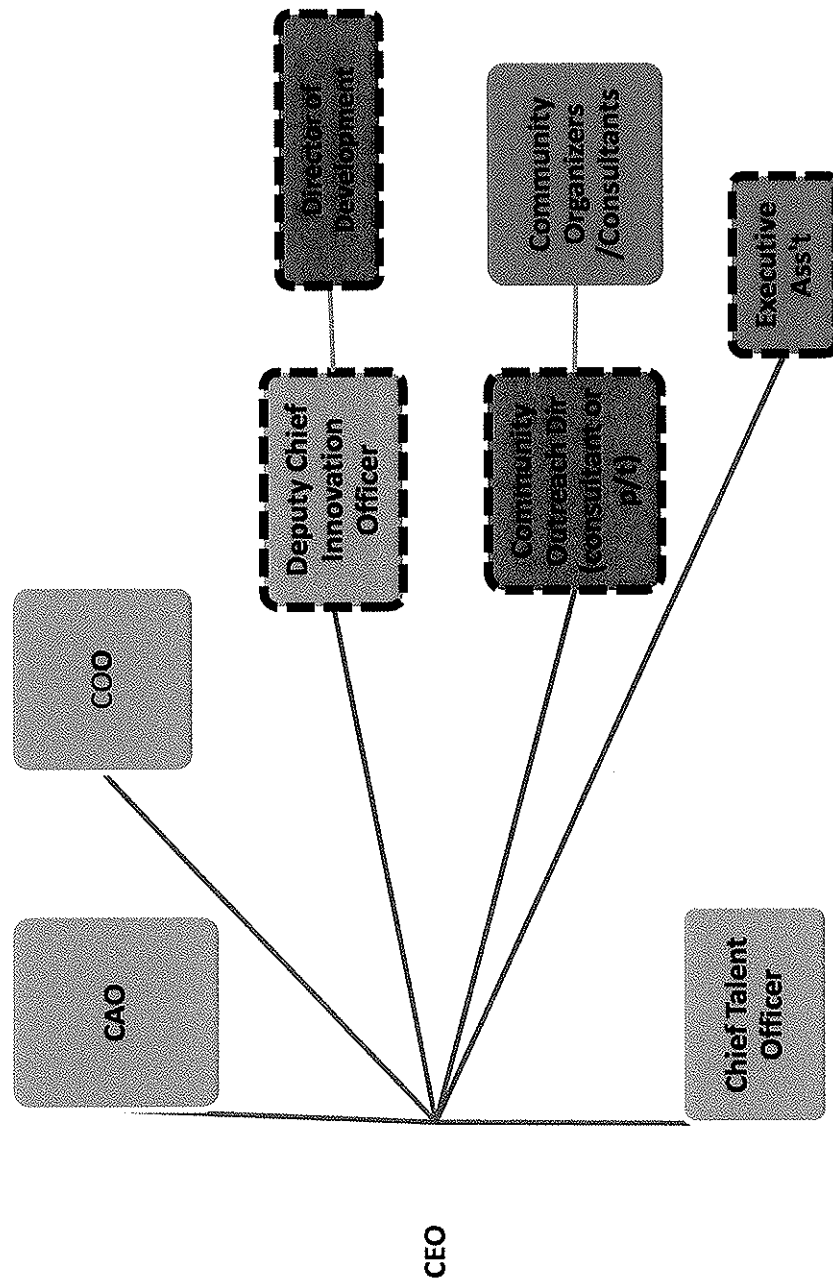
Although not all of the teachers at Mastery can show high growth, the system has been designed to allow all teachers to achieve at least medium growth. First, the system has been designed to give each individual teacher and each individual section the opportunity to achieve High growth, regardless of the section’s starting point. Second, a teacher will achieve Medium growth if (on average) a teacher’s students come close to or exceed their MVAS predictions for the year. Third, if a teacher has medium growth for at least 2/3 of the benchmark periods, they will have at least Medium growth for the year-to-date growth tier regardless of the aggregate MVAS tier determination.

# Mastery Charter Network

## Org Charts

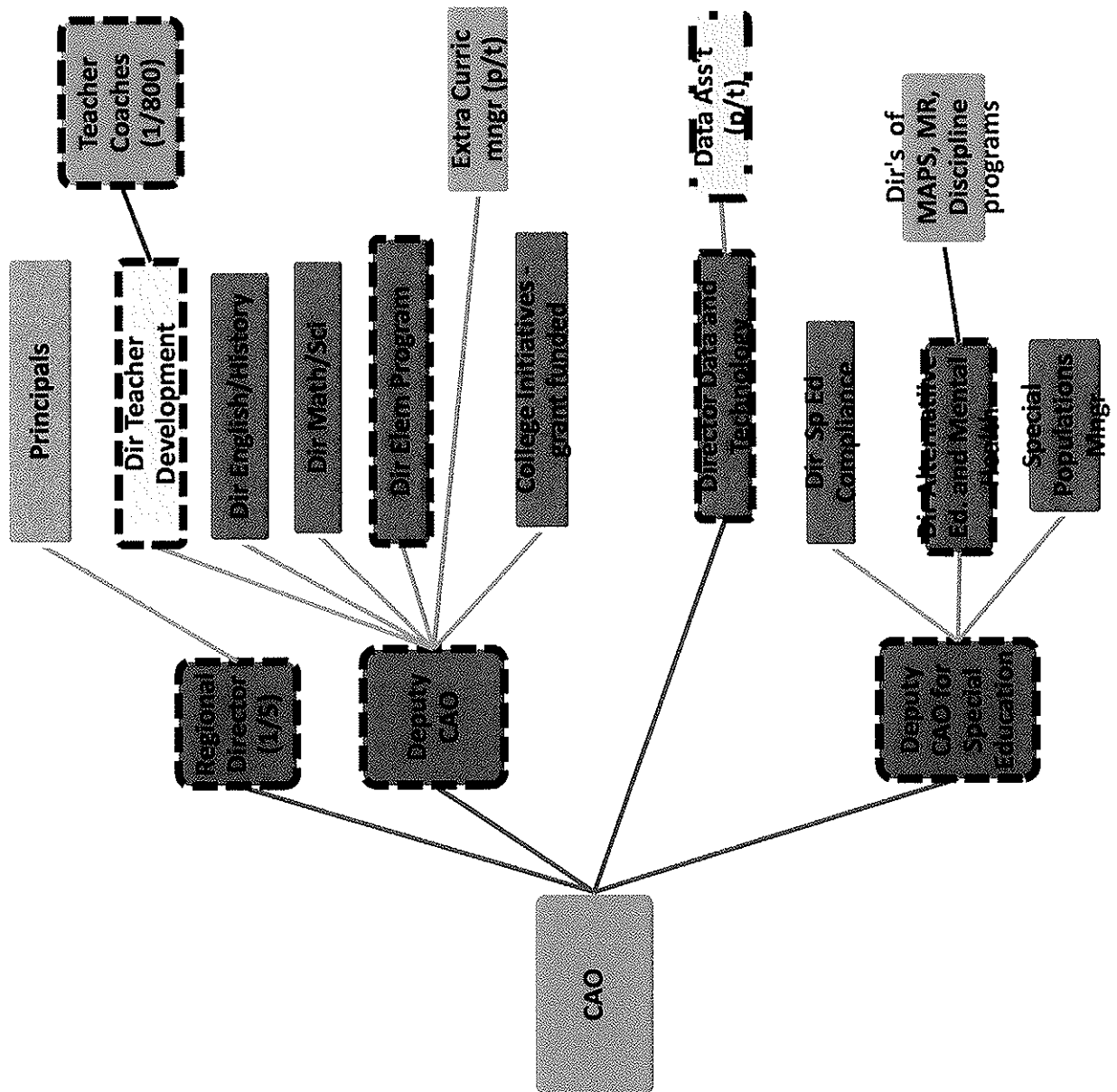
- CHIEF EXECUTIVE OFFICER
  - Talent (Leadership) Development
  - Board Communication Government Relations
  - New Initiatives/Expansion
  - Development
- CHIEF ACADEMIC OFFICER
  - Teacher Professional Development & Coaching
  - Curriculum
  - Assessment
  - Special Populations (IEP, ELL)
- CHIEF OPERATING OFFICER
  - Finance
  - Facilities
  - Technology
  - Human Resources

# Mastery Central Service Structure

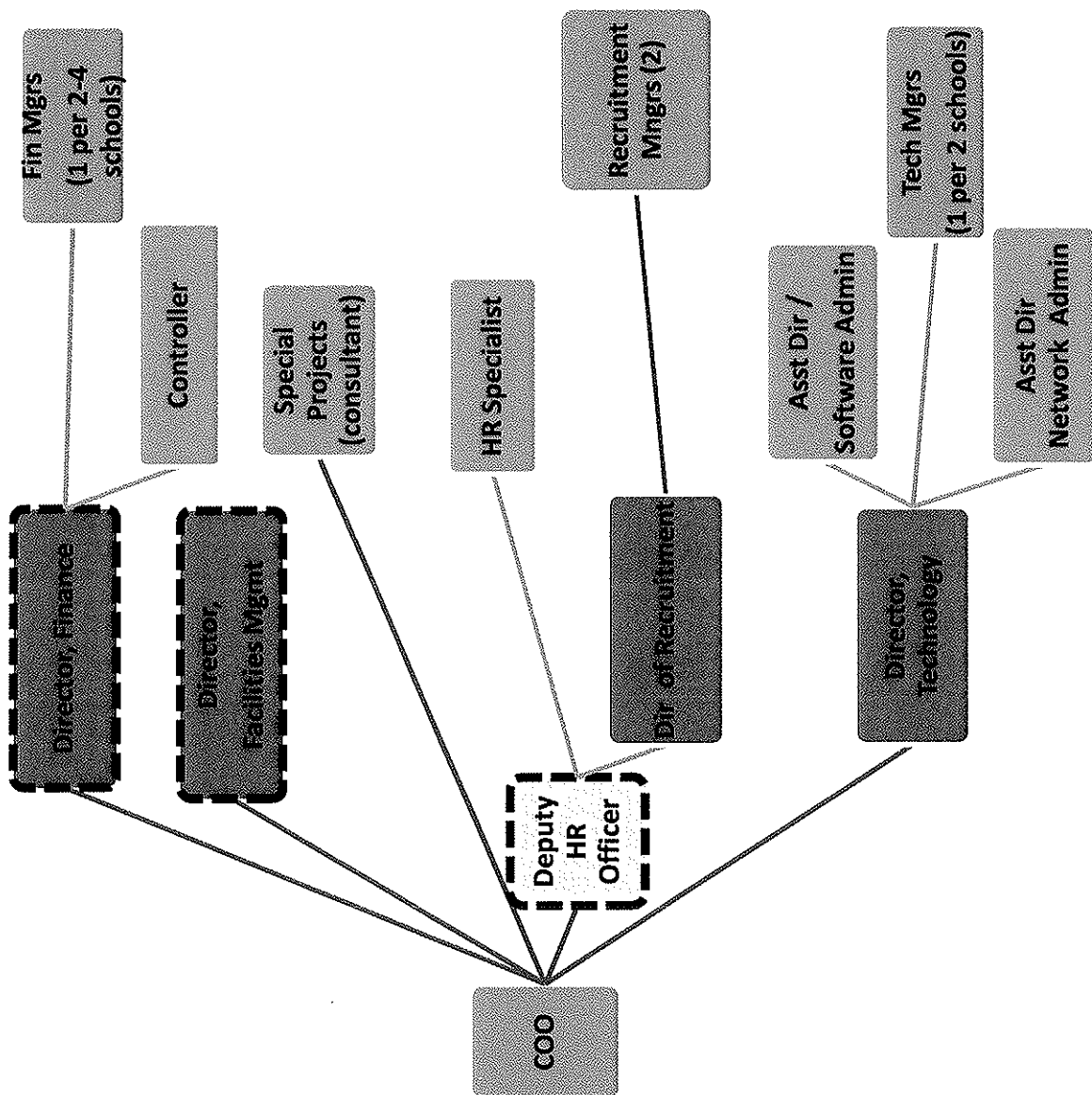




# Academic Team



# Operations



# Budget Narrative

## Budget Narrative

Attachment 1:

Title: **Mastery Budget Narrative** Pages: **7** Uploaded File: **Budget Narrative and docs CSP.pdf**

## **Part 5: Budget Narrative Attachment**

<b>1. Detail narrative on spending line items</b>	<b>pp. 1-4</b>
<b>2. Mastery Charter School Network CSP Grant Budget 2010-2015</b>	<b>p. 5</b>
<b>3. Annual CSP Allocations by School by Year</b>	<b>p. 6</b>
<b>4. Mastery Charter School Network Five Year Financial Model</b>	<b>p. 7</b>

### **Part 5: Item #1 – Written Budget Narrative Detail**

Mastery Charter School Network (Mastery Charter High School as lead applicant with more than 85% of resources going directly to individual new charter schools) is requesting funding to defray the cost of some School-based and Network Office staff over the next five years to support expanding new schools.

Other than in FY 11 where we are in the process of opening three new schools, we are including a planning year and two operational years of CSP funding for each new school we open in the next five years. The schools opening Fall 2010 will be eligible for 3 years of CSP funding for start up without a planning year. This funding is for a total of 15 schools with a variable level of funding in each year based on the Mastery five-year fiscal plan for supporting new schools. This plan for how the dollars are to be allocated by initiative in each year at each school are included on page five of this attachment “Annual CSP Allocations by School by Year.” There it is evident how we request fewer dollars in the third and final year of the grant for each school. However, this will also illuminate the overall budget picture, as we have more new schools between their planning and second years of operation during FY 13 leading to our highest year for grant funding over the five year grant. The financial model shows, that while the grant funding requested appears relatively flat over time, we are adding new schools each year and phasing schools out of the grant every year. For example, the three schools under CSP that open in Fall 2010 will no longer receive any CSP dollars in Fall 2013 and will be fully sustainable at that point in time at Mastery.

#### **1) Personnel Expenditures**

##### **School Based Staff**

APPRENTICE SCHOOL LEADERS (ASLs): Key to our expansion plan is building leadership teams for new schools in the year prior to opening. All matching funds in the budget are currently dedicated to supporting the ASL program over the next five years, as are a significant portion of planning year funds for each school. Each new school will have 4 ASLs at Mastery in the planning year prior to new school opening. This will fund 48 full time ASLs over 5 years.

We are requesting **\$3,929,128 in CSP Grant funding over five years to support this effort. These dollars will be matched by \$2,000,000 in private funds** to support to pay for 4 school leaders in training for each new

NEW TEACHER COACHES: We are requesting funding for new teacher coaches in the first two years of implementation for each school. **\$1,983,587** in grant funds is requested to support salaries for up to 2 teacher coaches at each new school (depending on size of faculty) over the life of the grant.

#### CSP FUNDED @ Mastery Network to Support New Schools

PROJECT DIRECTOR: Will serve 50% time on the TIF grant and this amount of her salary (\$118,000 base in FY 10) will be provided by Mastery operating funds. The PD will be responsible for overall leadership of the grant, all reporting to the Department of Education, and oversight for the implementation of charter expansion in conjunction with the CEO at Mastery. Her qualifications are described in Part D of the grant narrative.

We are requesting **\$286,670 in CSP Grant funding over five years to support this position.**

DIRECTOR OF PROFESSIONAL DEVELOPMENT AND COACHING: Our CSP proposal includes adding 550 new teachers over five years, over half of whom will have less than three years of teaching experience. While our current professional development system is incredibly strong, we need an additional skilled teacher trainer to focus solely on helping our new teachers improve their practice so they can be competitive in the incentive compensation pool and improve their students' achievement at the pace expected by Mastery.

We are requesting **\$385,207 to support this position over five years.**

We do not exceed the 15% cap by CSP Grants for support of any staff or resources at the Network level for school start up.

#### 2) Fringe Expenditures –

Mastery has a 32% fringe rate applied to all full time salaries of staff.

The CSP grant will cover **\$633,911 in fringe costs** for the FTE coaches covered by the grant over the five-year period.

Mastery Charter School will cover the full cost of fringe benefits for Apprentice School Leaders over the life of the grant and these costs of \$1,257,321 have not been included on the budget worksheet.

We have requested grant funding to cover **\$215,001 in fringe costs** associated with the two staff at Mastery Network who are either part or full time under the grant.

- 3) EQUIPMENT – We have not requested any funding for equipment under CSP.
- 4) SUPPLIES – We have requested **\$1,582,996** for new instructional materials needed to defray opening costs at each new school. These expenses include new books, testing materials, classroom furniture, and instructional intervention software. Mastery spends approximately \$1,000,000 per new school for start up costs and we are only asking for a fractional cost of that burden from the CSP grant.

5) CONTRACTUAL

Mastery has included one contract in the grant budget, which we believe are critical to the implementation of our expansion strategy.

**Mastery Value Added System:** Mastery has developed our new Value Added System with NESSO, LLC. over the 2009-10 academic year and this system is critical to our ability to use understand and use real-time value added growth measures in planning instruction and evaluating teacher ability. The contract award will allow all new Mastery schools to purchase their initial site licenses for the software (1x fee spread over 2 initial years after opening), have all new student data loaded into the system for predictive purposes, link MVAS to the Human Resources Information System for the teachers at the new schools, and provide comprehensive on-site training to all teachers and school leaders on use of the system to drive instructional change. NESSO will also be available through an online help-desk feature and will work directly with Mastery's on site Data Analyst to troubleshoot school-level issues with MVAS. They will also assess the system each year and make upgrades as appropriate. We have requested **\$297,500 in grant funds** to support this data system roll out. Our actual costs for the system over the next five years are \$450,000, and Mastery has budgeted for the additional costs in their operating budget.

6) CONSTRUCTION – N/A

7) OTHER – N/A

8) TOTAL DIRECT COSTS

The total direct costs requested from the Department of Education to support the Mastery Charter Schools TIF Proposal are **\$7,950,000**.

9) INDIRECT COSTS

Mastery Charter School does not have an indirect cost rate and must apply for funding based on an 8% indirect rate. We will apply for an indirect cost rate and if we are awarded a grant, we will shift funds in the budget to reflect the expenditure of the actual rate approved. The five year indirect rate based on the 8% factor is **\$636,000**.

## 10) TOTAL COSTS

The total cost of the project using CSP grant dollars is \$7,446,283. In addition, Mastery Charter Schools is providing \$2,000,000 in match to support the full cost of the CSP Expansion initiative proposed in the grant narrative. We did not include other Mastery Charter operating dollars that will support these initiatives in the grant budget as match (e.g. partial ASL salaries, all ASL fringe).

Costs for each year of the project are listed below:

	<b>FY 11</b>	<b>FY 12</b>	<b>FY 13</b>	<b>FY 14</b>	<b>FY 15</b>	<b>TOTAL</b>
CSP \$	1,260,000	1,710,000	2,160,000	1,710,000	1,110,000	<b>\$7,950,000</b>
Match \$	509,936	577,440	595,082	317,542	0	<b>\$2,000,000</b>

**Mastery Charter School Expansion Grant Budget -- FY 11-15 -- Add 15 schools/ +8,527 students**

<b>INCOME</b>		FY 11	FY 12	FY 13	FY 14	FY 15
Schools w/ Planning Year (PY): PY \$200K, Yr 1 \$220K, Yr 2 \$150K						
Schools w/o PY: Yr 1 \$220K, Yr 2 \$150K, Yr 3 \$150K						
Grant Award from DOE						
A) 3 open Fall 2010 add 2000 students		\$660,000	\$450,000	\$450,000		
B) 3 open Fall 2011 add 1650 students	Plan yr FY 11	\$600,000	\$660,000	\$450,000		
C) 3 open Fall 2012 add 1650 students			\$600,000	\$660,000	\$450,000	
D) 3 open Fall 2013 add 1650 students				\$600,000	\$660,000	\$450,000
E) 3 open Fall 2014 add 1650 students					\$600,000	\$660,000
CSP Grant	\$7,950,000	\$1,260,000	\$1,710,000	\$2,160,000	\$1,710,000	\$1,110,000
MATCH	\$2,000,000 (NSVF & JY)	\$500,000	\$500,000	\$500,000	\$500,000	

**EXPENSES**

			FY 11	FY 12	FY 13	FY 14	FY 15		
SCHOOL LEVEL EXPENSES									
PERSONNEL	App. School Leaders (4/sch in plan yr)		\$984,005	\$1,050,600	\$1,082,118	\$812,405	\$0	*FY 14 \$302K covered by MCS	\$3,929,128
	Fringe on ASLs	32%					\$0	\$336,192 covered by MCS	\$0
	Teacher Coaches	80k/pp FY 11	\$80,000	\$329,600	\$509,232	\$524,509	\$540,246	school/Network exp. in yr 2 fwd	\$1,983,587
Contracts	Fringe on NTCs	\$0.32	\$25,600	\$105,472	\$162,119	\$167,841	\$172,879		\$633,911
	Value Added System (MVAS - NESSO)		\$45,000	\$75,000	\$100,000	\$55,000	\$22,500	15K/yr ps for 2 yrs	\$297,500
Books/Instr Materials	New Classroom/Inst Materials (books/ pre-testing supplies/ grow a grade materials/ instructional interv matls)	Actual cost: \$750K for 3 schools / over 2 yrs	\$372,174	\$364,710	\$496,797	\$167,737	\$181,578		\$1,582,996
TOTAL: SCHOOL LEVEL SUPPORT			\$1,506,779	\$1,925,382	\$2,350,266	\$1,727,492	\$917,203	\$8,427,122	\$8,427,122

**Central Office Level (15% max)**

**PERSONNEL**

(9 mos in FY 11; 12 mos in FY 12-15)

Dir, PD & Coaching*	Sal	\$78,750	\$108,150	\$111,395	\$57,368	\$29,545	*100% yrs 1-3; 50% yr 4; 25% yr 5	\$385,207
Project Director**	Sal	\$44,248	\$62,500	\$64,375	\$66,306	\$49,241	** 50% 4 yrs; 35% year 5	\$286,670
<b>FRINGE</b>		\$39,359	\$54,608	\$56,246	\$39,576	\$25,211		\$215,001
<b>Central office Support</b>								
<b>TOTAL</b>		\$162,357	\$225,258	\$232,016	\$163,250	\$103,997		\$886,878
% of total grant award:		12.89%	13.17%	10.74%	9.55%	9.37%	cap 15%	

**TOTAL DIRECT COSTS:**

\$1,669,136	\$2,150,640	\$2,582,282	\$1,890,742	\$1,021,200	\$9,314,000
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**Indirect @ 8%**

\$100,800	\$136,800	\$172,800	\$136,800	\$88,800	\$636,000
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TOTAL GRANT AWARD	\$1,260,000	\$1,710,000	\$2,160,000	\$1,710,000	\$1,110,000	\$7,950,000
TOTAL MATCHING FUNDS (year spent)	\$509,936	\$577,440	\$595,082	\$317,542	\$0	\$2,000,000
Budget Balanced?	\$0	\$0	\$0	\$0	\$0	\$9,950,000



Mastery Charter School Expansion  
Year by Year Budget Breakdowns - 3 Schools/year in Three Phases

<b>FY 11</b>		<b>\$660,000</b>	<b>\$600,000</b>
Ind		\$52,800	\$48,000
\$162,357 CO		\$84,426	\$77,931
ASL		\$0	\$474,069
TC		\$105,600	\$0
Books		\$372,174	\$0
MVAS		\$45,000	\$0
		<b>\$660,000</b>	<b>\$600,000</b>
Match ASL -			\$509,936

<b>FY 12</b>	<b>\$450,000</b>	<b>\$660,000</b>	<b>\$600,000</b>
Ind	\$35,129	\$53,671	\$48,000
CO	\$58,567	\$87,851	\$78,840
ASL	\$0	\$0	\$473,160
TC	\$326,304	\$108,768	\$0
Books	\$0	\$364,710	\$0
MVAS	\$30,000	\$45,000	\$0
	<b>\$450,000</b>	<b>\$660,000</b>	<b>\$600,000</b>
Match -			
ASL			\$577,440

	Yr 3	Yr 2	Yr 1	Plan Yr
<b>FY 13</b>	<b>\$450,000</b>	<b>\$450,000</b>	<b>\$660,000</b>	<b>\$600,000</b>
Ind	\$36,000	\$36,000	\$52,800	\$48,000
CO	\$60,000	\$48,742	\$58,310	\$64,964
ASL	\$0	\$0	\$0	\$487,036
TC	\$224,062	\$335,258	\$112,031	
Books	\$104,938	\$0	\$391,859	\$0
MVAS	\$25,000	\$30,000	\$45,000	\$0
<b>Subtotal</b>	<b>\$450,000</b>	<b>\$450,000</b>	<b>\$660,000</b>	<b>\$600,000</b>
Match -				
ASL				\$595,082
	* 2 TC			

Planning Year	\$600,000
Year 1 Implement.	\$660,000
Year 2 Implement.	\$450,000
*Year 3 (sch w/o pl yr)	\$450,000

\*allocation for 3  
schools in category in  
given year

	Yr 2	Yr 1	Plan Yr
<b>FY 14</b>	<b>\$450,000</b>	<b>\$660,000</b>	<b>\$600,000</b>
Ind	\$36,000	\$52,800	\$48,000
CO	\$42,445	\$63,668	\$57,138
ASL	\$0	\$0	\$494,863
TC	\$346,175	\$346,175	
Books	\$15,380	\$152,357	
MVAS	\$10,000	\$45,000	\$0
<b>Subtotal</b>	<b>\$450,000</b>	<b>\$660,000</b>	<b>\$600,000</b>
Match ASL			\$317,542

	Yr 2	Yr 1
<b>FY 15</b>	<b>\$450,000</b>	<b>\$660,000</b>
Ind	\$36,000	\$52,800
CO	\$42,639	\$61,358
ASL	\$0	\$0
TC	\$356,562	\$356,562
Books	\$7,299	\$174,279
MVAS	\$7,500	\$15,000
<b>Subtotal</b>	<b>\$450,000</b>	<b>\$660,000</b>

# MASTERY CHARTER EXPANSION PLAN

	Yr 1 CSP	Yr 2 CSP	Yr 3 CSP	Yr 4 CSP	Yr 5 CSP	
	FY10	FY11	FY12	FY13	FY14	FY15
# of new schools	-	3	3	3	3	3
Total number of schools	4	7	10	13	16	19
Students in existing schools	2,079	2,425	4,045	5,665	7,285	8,905
Students in new schools	-	1,620	1,620	1,620	1,620	1,620
Total number of students	2,079	4,045	5,665	7,285	8,905	10,525
Revenue	41,461,250	58,066,250	74,671,250	91,276,250	107,881,250	124,486,250
Central Office (CO) Revenue	3,316,900	4,645,300	5,973,700	7,302,100	8,630,500	9,958,900
CO Expenses base	(5,600,000)	(5,900,000)	(6,300,000)	(6,700,000)	(7,100,000)	(7,500,000)
CO Loss	(2,283,100)	(1,254,700)	(326,300)	602,100	1,530,500	2,988,500
Apprentice School Leaders	(1,300,000)	(1,300,000)	(1,300,000)	(1,300,000)	(1,300,000)	(1,300,000)
New School Start-up Costs	(3,000,000)	(3,000,000)	(3,000,000)	(3,000,000)	(3,000,000)	(3,000,000)
New School Facilities	(3,000,000)	(3,000,000)	(3,000,000)	(3,000,000)	(3,000,000)	(3,000,000)
TOTAL NEED	(9,583,100)	(8,554,700)	(7,626,300)	(6,697,900)	(4,469,500)	(3,931,500)
PLEDGES						
Foundation Current Pledges	500,000					
NewSchools*	1,000,000	1,000,000	400,000			
B Lenfest	1,333,000	1,333,000	1,333,000			
J. Yass*	1,000,000	1,500,000				
TOTAL FUNDS PLEDGED	3,833,000	3,833,000	1,733,000			
Cash On Hand	3,160,780	(2,589,320)	(7,311,020)	(13,204,320)	(19,902,220)	(24,371,720)
TOTAL NEEDED FOR FIVE YEAR EXPANSION	1,260,000	1,710,000	2,160,000	1,710,000	1,110,000	7,950,000
**If CSP Awarded to Mastery						
TOTAL NEEDED FOR FIVE YEAR EXPANSION						(24,371,720)
TOTAL STILL NEEDED FOR FIVE YEAR EXPANSION w/ CSP GRANT FUND AWARD						(16,421,720)

540 students per new sch.

\$ 10,250 per child  
8.0% Central Services fee

TOTAL  
(1,731,500)  
(5,200,000) 12 leaders/year  
(15,000,000) 1,000,000 per school  
(15,000,000) 1,000,000 per school

\*CSP match pledged

\*CSP match pledged